Travel Activities & Motivation Survey

Interest In Agri-Tourism

Profile Report

TAMS
Travel Activities & Motivation Survey

May, 2001

Lang
RESEARCH

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Travel Activities & Motivation Survey

Prepared by:

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on behalf of

Atlantic Tourism Partnership

Canadian Tourism Commission

Department of Canadian Heritage

Greater Toronto Hotel Association

Manitoba Ministry of Industry, Trade & Tourism

Northern Ontario Heritage Fund

Ontario Casino Corporation

Ontario Ministry of Agriculture, Food & Rural Affairs

Ontario Ministry of Tourism, Culture & Recreation

Ontario Tourism Marketing Partnership

Parks Canada

Saskatchewan Tourism Authority

Tourism B.C.

Tourism Toronto

Yukon Government Department of Tourism

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Interest in Agri-Tourism

- Key Findings -

Overall, 7.3 % of the travellers have participated in two or more travel activities associated with agri-tourism (i.e., visiting a farmers' fair or market with travelling; visiting a pick-your-own farm or participating in a harvest; staying at a working farm or guest ranch). During the past two years, 33 % of travellers have participated in at least one of these three agri-tourism activities while travelling. There was no meaningful difference between Canadians and Americans in the likelihood of participating in agri-tourism while travelling.

Female travellers, and especially female Canadian travellers, were slightly more likely to have participated in agri-tourism activities while travelling during the past two years than were males. Participation in agri-tourism also increased as the income of the household increased, but was unrelated to the level of education of the traveller. Overall, Affluent Families and Affluent Mature and Senior Couples represent the prime target markets for agri-tourism.

Those who travel domestically were more likely to participate in agri-tourism while on a trip than those who travel internationally. While the TAMS database is inappropriate to determine what types of trips were taken when the traveller participated in agri-tourism activities, the data suggests that travellers are more likely to participate in such activities during shorter-haul domestic vacations than international or longer-haul trips.

Those with an interest in agri-tourism were more likely to have sought out vacation experiences that allow exploration and learning. They were also more likely to participate in outdoor activities with a nature theme such as hunting and fishing, canoeing and kayaking, and hiking and biking, and to have visited zoos, aquariums and planetariums. They were also more likely to have exhibited increased interest in new tourism attractions with a nature theme such as an overnight train ride through natural terrain, a game park or game preserve with wildlife viewing areas, wine tours, forestry and mining tours, and a world-class fishing tournament. Those with a high interest in agri-tourism were also more likely to have sought out French Canadian cultural experiences and opportunities to learn through visits to aboriginal attractions and heritage attractions. Overall, those with an interest in agri-tourism are likely to be responsive to opportunities to learn and explore nature or different cultures.

In both Canada and the United States, travellers who exhibited a high interest in agri-tourism were more likely to have a more favourable impression of Canada and Ontario than those who were not interested in such activities. This suggests that these markets may be more predisposed to consider Canada and Ontario as a travel destination.

Intérêt pour l'agrotourisme

- Conclusions principales -

Dans l'ensemble, 7,3 % des voyageurs ont participé à au moins deux activités agrotouristiques (c.-à-d. aller dans un marché ou une foire agricole lors d'un voyage, visiter une ferme libre-service ou participer à une récolte, séjourner sur une ferme ou un ranch touristique). Au cours des deux dernières années, 33 % des voyageurs ont participé à au moins une de ces activités agrotouristiques dans le cadre d'un voyage. Aucune différence significative n'a été observée entre les Canadiens et les Américains en ce qui concerne la probabilité qu'ils participent à une activité liée à l'agrotourisme lors d'un voyage.

Au cours des deux dernières années, les femmes qui ont voyagé, particulièrement les Canadiennes, étaient légèrement plus susceptibles de participer à des activités agrotouristiques lors d'un voyage que les hommes. La participation aux activités agrotouristiques a connu une hausse connexe à celle du revenu des ménages, bien que cette augmentation ne soit pas liée au niveau d'éducation du voyageur. Dans l'ensemble, les familles, les couples mariés et les couples de personnes âgées fortunés représentent le principal marché visé par l'agrotourisme.

Les gens qui voyagent à l'intérieur du pays sont plus susceptibles de participer à une activité agrotouristique lors d'un voyage que ceux qui voyagent à l'étranger. Bien que la base de données de TAMS ne permette pas de déterminer quel genre de voyage est affiliné les voyageurs qui ont participé à des activités agrotouristiques, les données suggèrent que de les voyageurs participent davantage à de telles activités lors de vacances plus brèves au pays que lors de voyages plus longs à l'étranger.

Les gens qui s'intéressent à l'agrotourisme sont plus susceptibles de rechercher une expérience de vacances leur permettant d'explorer et d'apprendre. Ils sont aussi plus susceptibles de participer à des activités de plein air liées à la nature comme la chasse, la pêche, le canot, le kayak, la randonnée, le vélo et de visiter des zoos, des aquariums et des planétariums. Ils sont également plus susceptibles de montrer un intérêt accru pour les nouvelles attractions touristiques liées à la nature telles qu'un voyage en train de nuit en terrain naturel, la visite d'une réserve naturelle ou d'une réserve de chasse comportant des sites d'observation d'animaux sauvages, la visite de vignobles, de sites forestiers et des mine ainsi que la participation à un tournoi de pêche d'envergure internationale. Les gens qui s'intéressent à l'agrotourisme sont plus susceptibles de chercher à vivre des expériences liées à la culture canadienne française et de profiter de possibilités d'apprentissage grâce à la visite d'attractions autochtones et d'attractions associées au patrimoine. Dans l'ensemble, les gens qui s'intéressent à l'agrotourisme sont susceptibles d'être réceptifs à la possibilité d'apprendre et d'explorer la nature ou différentes cultures.

Au Canada ainsi qu'aux États-Unis, les voyageurs qui démontrent un vif intérêt pour l'agrotourisme sont davantage susceptibles d'avoir une impression plus favorable du Canada et de l'Ontario que ceux qui ne s'intéressent pas à ces activités. Ceci suppose que ces marchés peuvent être davantage prédisposés à considérer le Canada et l'Ontario comme destinations touristiques.

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Background

An association of Canadian tourism ministries and organizations have collaborated to conduct two large scale surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans.

This survey, known as the *Travel Activities and Motivation Survey* (TAMS), represents the comprehensive assessment of travel behavior and motivators, and provides a rich and authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada and Ontario.

A series of analyses are being conducted using the TAMS database to explore the travel patterns of the marketplace as well as the factors which motivate travel behavior. TAMS consisted of both a telephone survey and a self-completed mailback survey. The survey was conducted in Canada and the United States between September 27, 1999 and April 16, 2000. The telephone survey was completed by 20,307 individuals in the United States and by 14,387 individuals in Canada. Respondents were selected randomly within the household. People participating in the telephone survey who had travelled in the past two years or expressed interest in travel in the next two years were asked to complete a mailback questionnaire. Overall, 40,271 qualified for the mailback questionnaire. Of these 11,892 (29.8 %) returned usable questionnaires. The response rate was higher in Canada with 5,490 (37.2 %) returning the questionnaire while 6,402 (26.0 %) of the U.S. respondents returned the questionnaire.

This current study examines interest in agricultural tourism or "agri-tourism" (i.e., visiting a farmers' fair or market, visiting a pick-your-own farm or participating in a harvest, staying at a working farm or guest ranch) while travelling during the past two years. The database was used to identify sectors of the market that exhibit a moderate interest or high interest in agri-tourism. This report provides the demographic profile, Canadian travel activities, Canadian travel intentions, vacation experiences sought during the past two years, vacation activities participated in during the past two years, media consumption habits, information sources consulted to plan local and longer vacations, and impressions of Canada and Ontario relative to the interest shown in agri-tourism while travelling. This report also provides an Overall Market Potential to identify those segments that offer the best potential for marketing, advertising and promotional activities designed to promote Canada's and Ontario's agri-tourism activities.

Agri-Tourism Interest Index

Construction of the Index

The Travel Habits Survey contained five items specifically associated with agri-tourism while travelling that were used to construct an overall Agri-Tourism Interest Index. These were as follows:

- Whether the respondent had visited a farmers' fair or market while travelling in the past two years.
- Whether the respondent had visited a pick-your-own farm or participated in a harvest while travelling in the past two years.
- Whether the respondent had stayed at a working farm or guest ranch while travelling in the past two years.

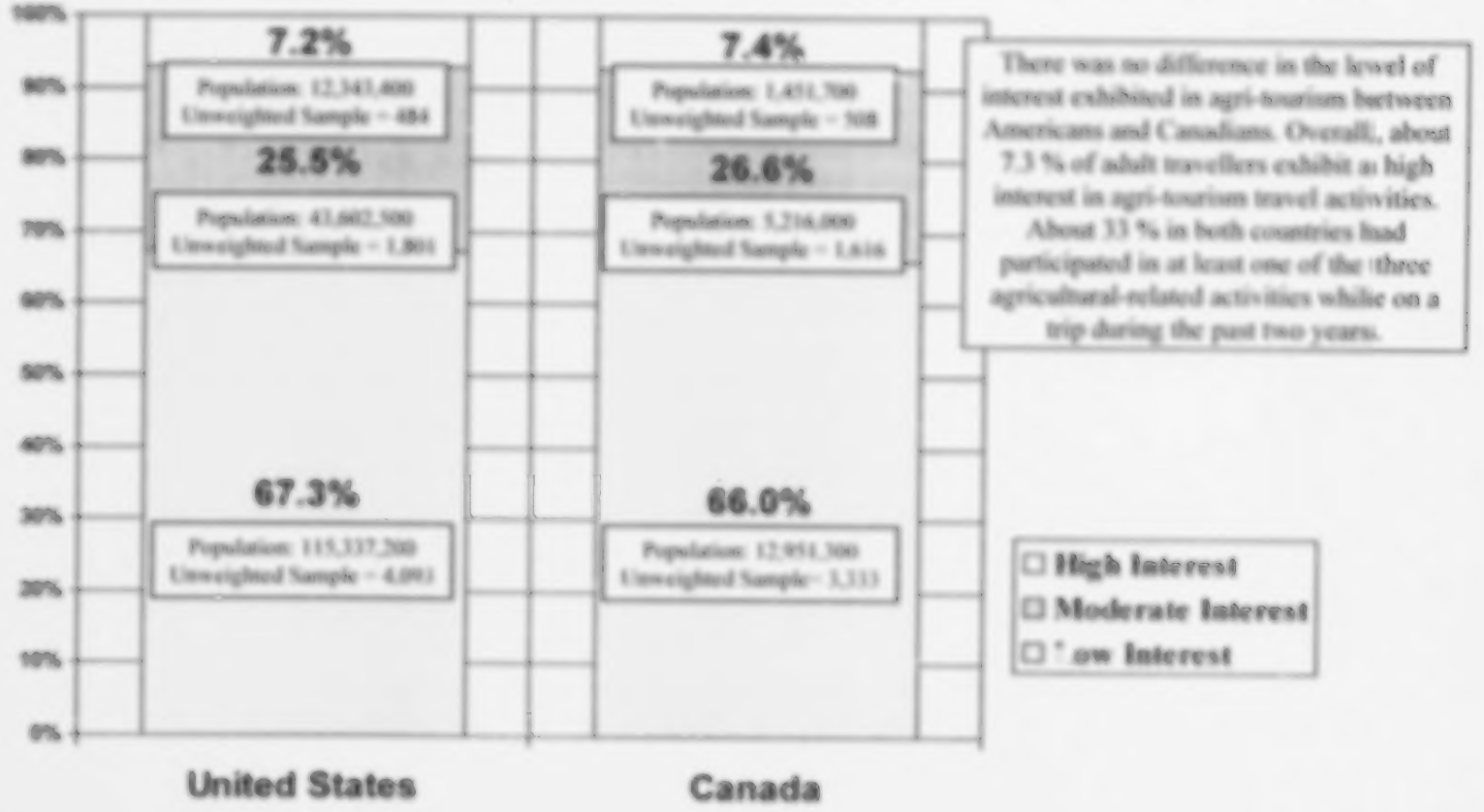
Those who had not participated in any of these activities during the past two years were considered to exhibit a "low interest" in agri-tourism while travelling. Those who had participated in one of the three activities were considered to exhibit a "moderate interest", and those who had participated in two or all three activities were classified as manifesting a "high interest" in agri-tourism.

Interest in Agri-Tourism

Canada versus United States

Based on Participation in Agricultural-Related Activities While Travelling in the Past Two Years

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



There was no difference in the level of interest exhibited in agri-tourism between Americans and Canadians. Overall, about 7.3 % of adult travellers exhibit a high interest in agri-tourism travel activities. About 33 % in both countries had participated in at least one of the three agricultural-related activities while on a trip during the past two years.

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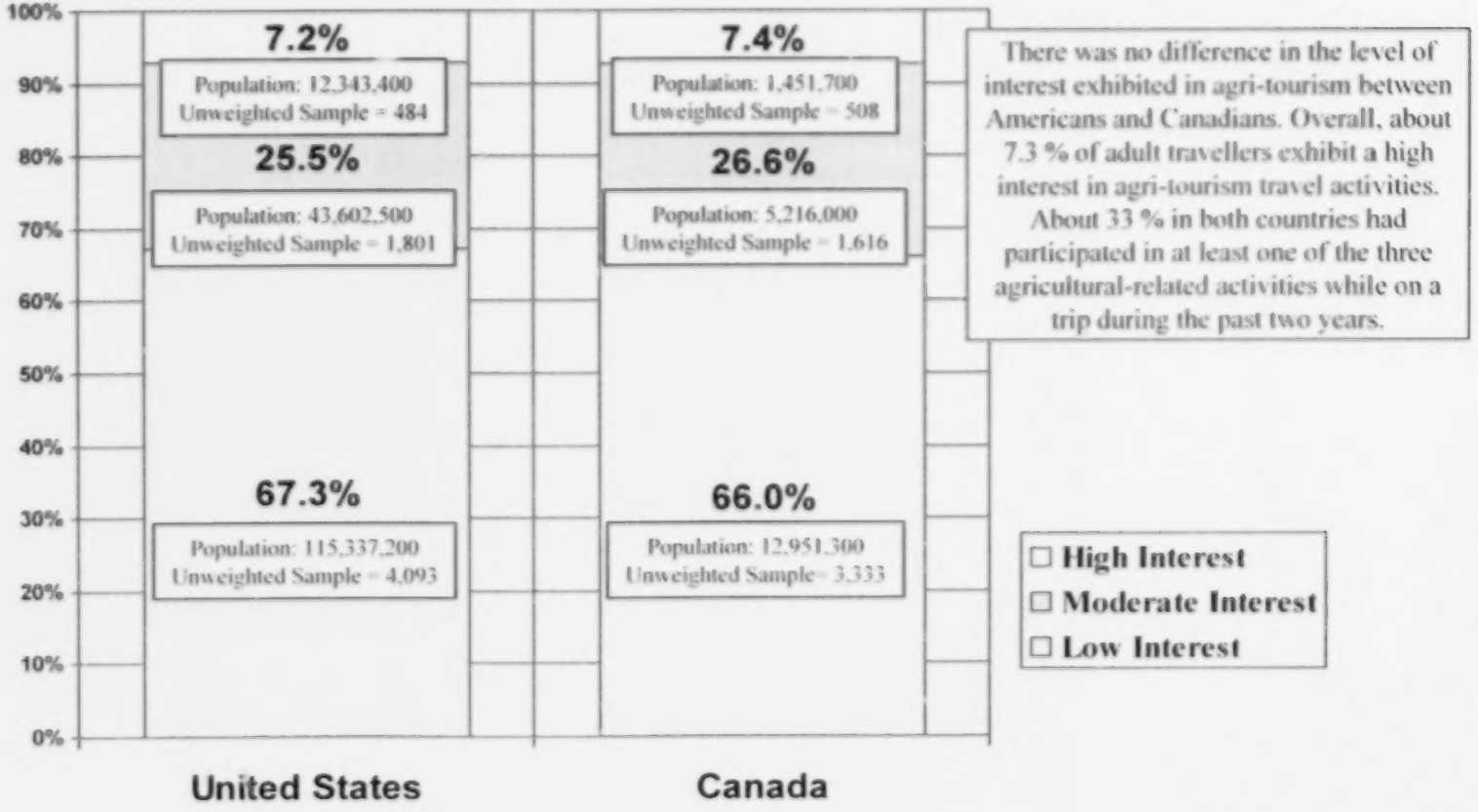

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Canada: By Province

Based on Participation in Agricultural-Related Activities While Travelling in the Past Two Years

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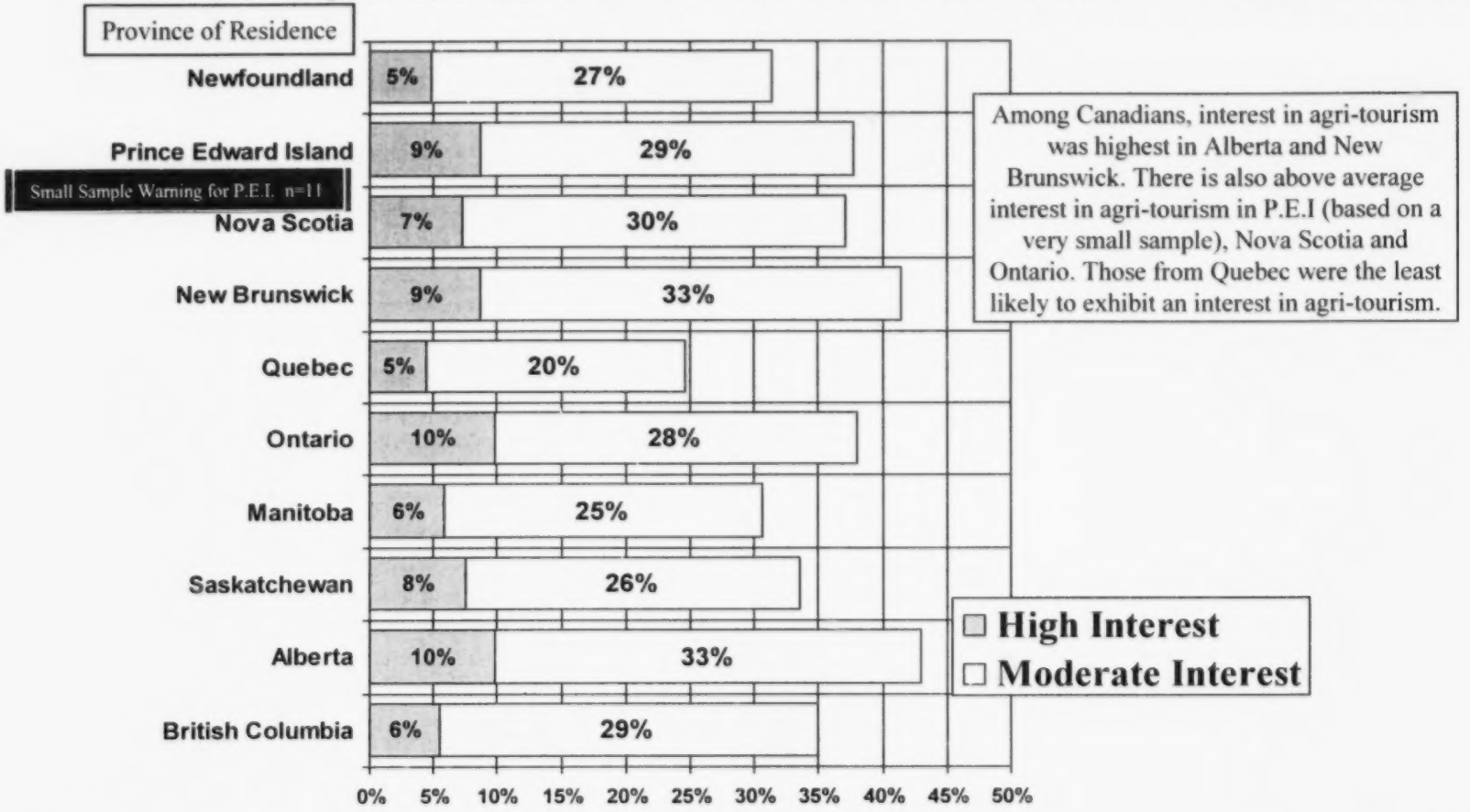


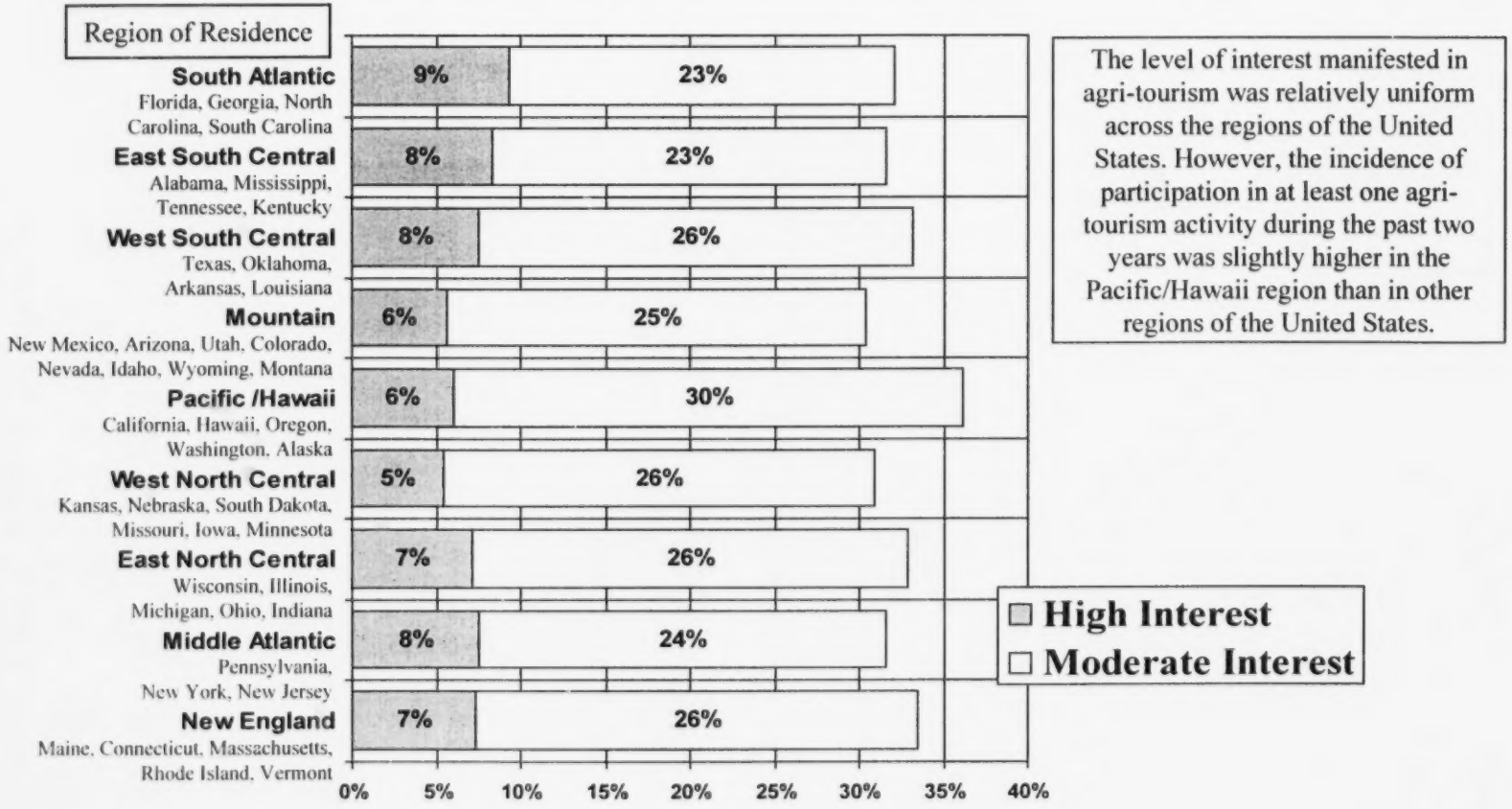
Among Canadians, interest in agri-tourism was highest in Alberta and New Brunswick. There is also above average interest in agri-tourism in P.E.I (based on a very small sample), Nova Scotia and Ontario. Those from Quebec were the least likely to exhibit an interest in agri-tourism.

Interest in Agri-Tourism

United States: By Region

Based on Participation in Agricultural-Related Activities While Travelling in the Past Two Years

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years

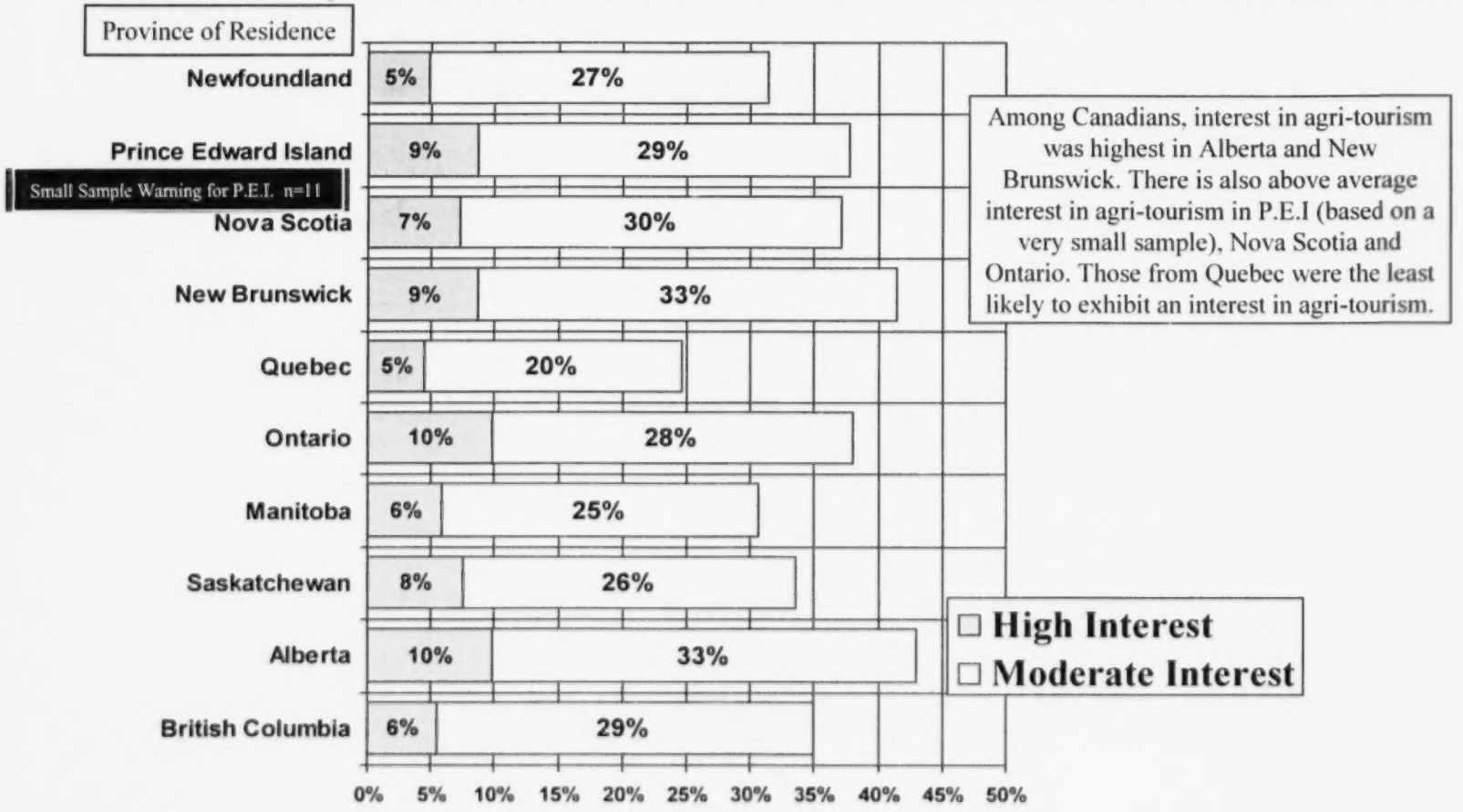


The level of interest manifested in agri-tourism was relatively uniform across the regions of the United States. However, the incidence of participation in at least one agri-tourism activity during the past two years was slightly higher in the Pacific/Hawaii region than in other regions of the United States.

Canada: By Province

Based on Participation in Agricultural-Related Activities While Travelling in the Past Two Years

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



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United States: By Region

Based on Participation in Agricultural-Related Activities While Travelling in the Past Two Years

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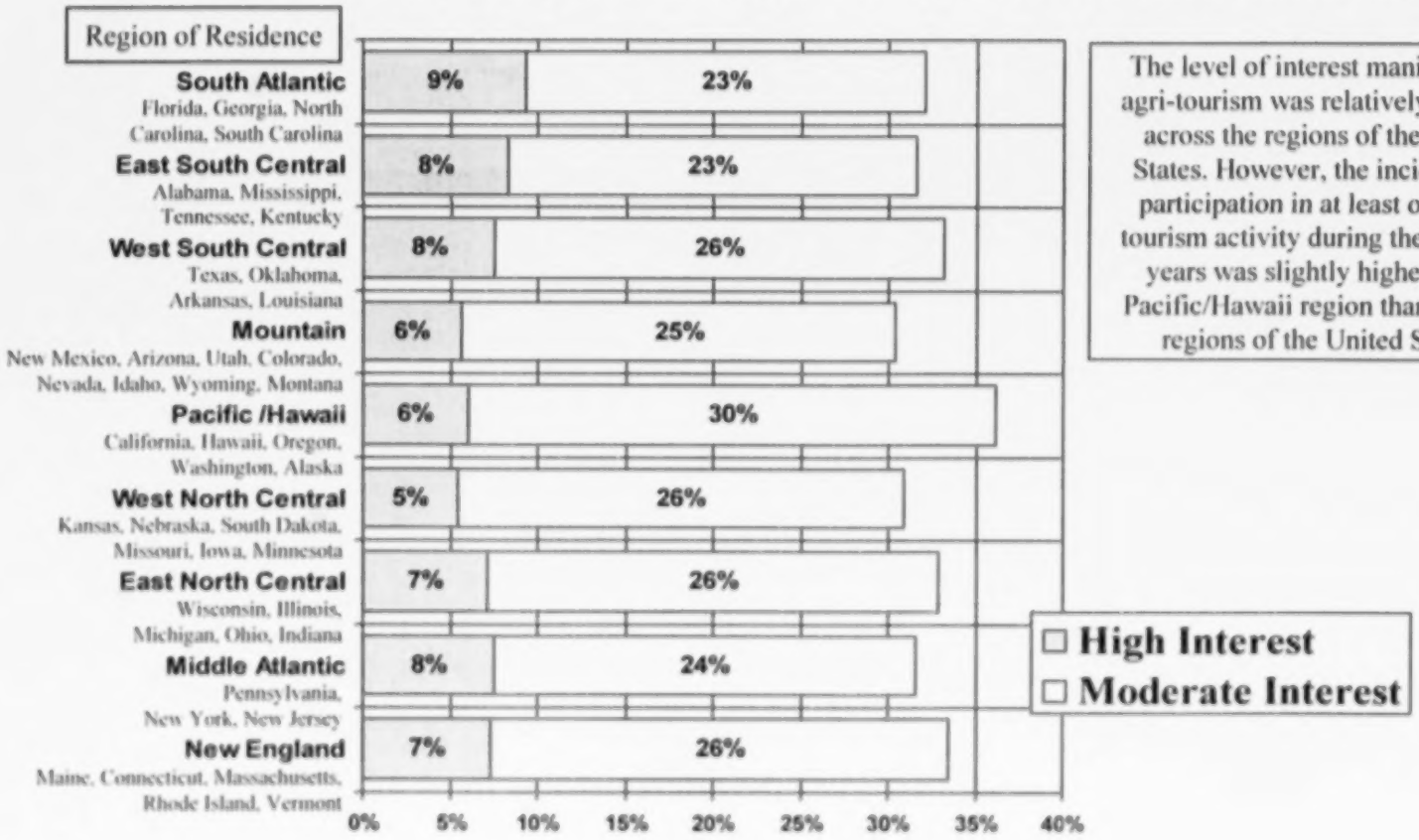

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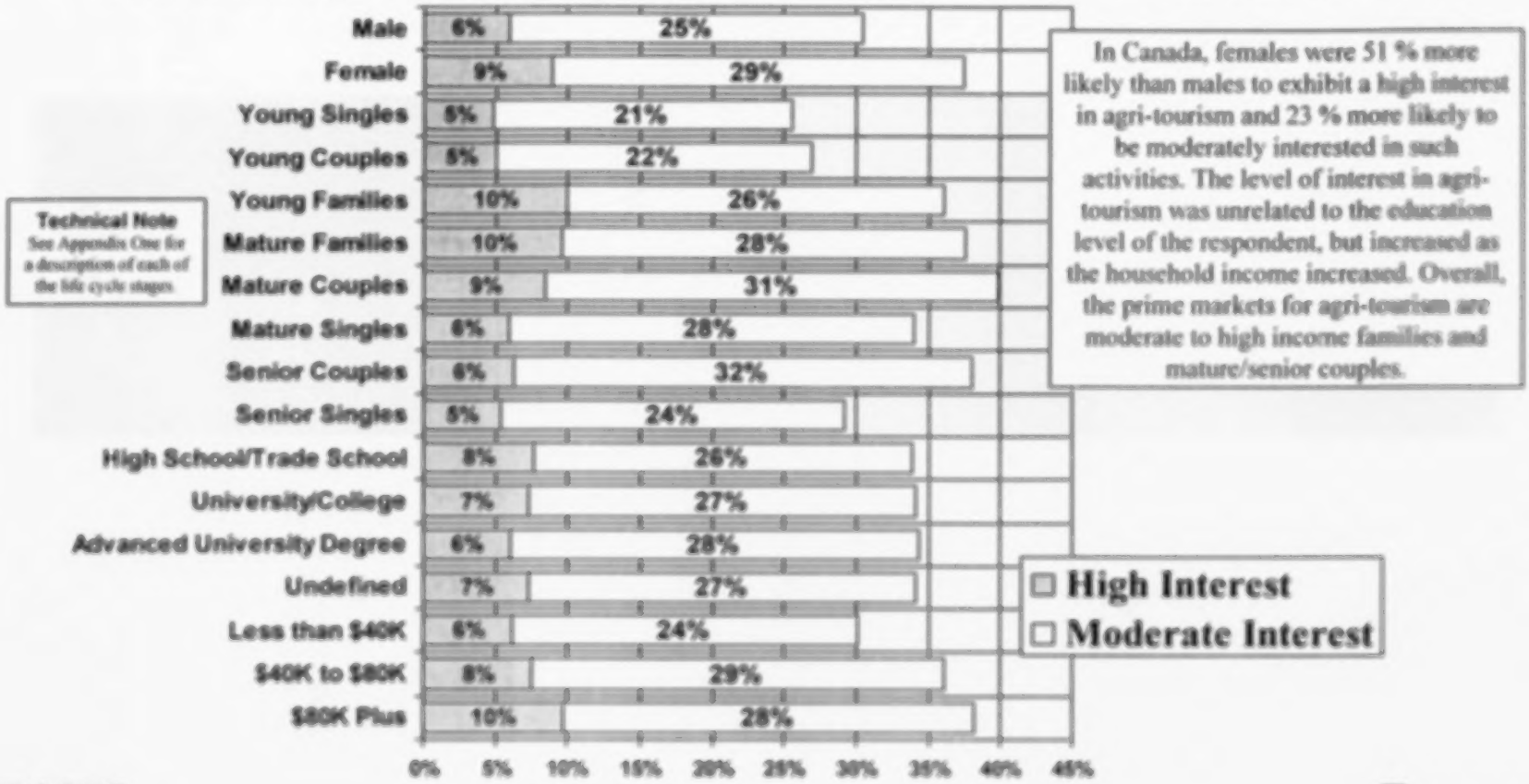
Interest in Agri-Tourism

Canada: By Demographics

Based on Participation in Agricultural-Related Activities While Travelling in the Past Two Years

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years


Male 6% 25%
Female 9% 29%
Young Singles 5% 21%
Young Couples 5% 22%
Young Families 10% 26%
Mature Families 10% 28%
Mature Couples 9% 31%
Mature Singles 6% 28%
Senior Couples 6% 32%
Senior Singles 5% 24%
High School/Trade School 8% 26%
University/College 7% 27%
Advanced University Degree 6% 28%
Undefined 7% 27%
Less than $40K 6% 24%
$40K to $80K 8% 29%
$80K Plus 10% 28%
0% 5% 10% 15% 20% 25% 30% 35% 40% 45%
High Interest
Moderate Interest

Technical Note
See Appendix One for a description of each of the life cycle stages.

In Canada, females were 51 % more likely than males to exhibit a high interest in agri-tourism and 23 % more likely to be moderately interested in such activities. The level of interest in agri-tourism was unrelated to the education level of the respondent, but increased as the household income increased. Overall, the prime markets for agri-tourism are moderate to high income families and mature/senior couples.

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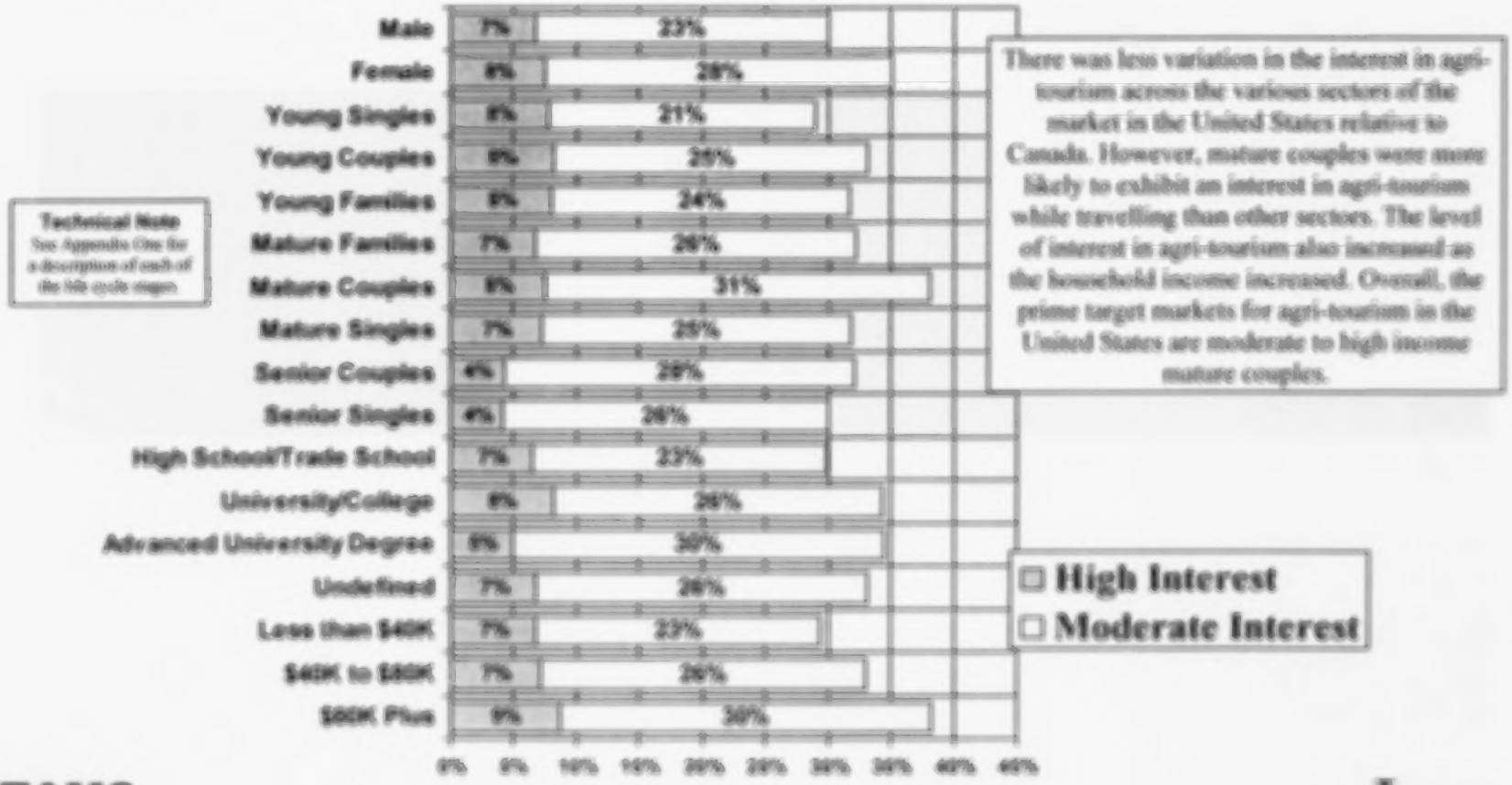
Interest in Agri-Tourism

United States: By Demographics

Based on Participation in Agricultural-Related Activities While Travelling in the Past Two Years

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years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University/College 8% 26%
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Undefined 7% 26%
Less than $40K 7% 23%
$40K to $80K 7% 26%
$80K Plus 9% 30%
0% 5% 10% 15% 20% 25% 30% 35% 40% 45%
High Interest
Moderate Interest

Technical Note
See Appendix One for a description of each of the life cycle stages.

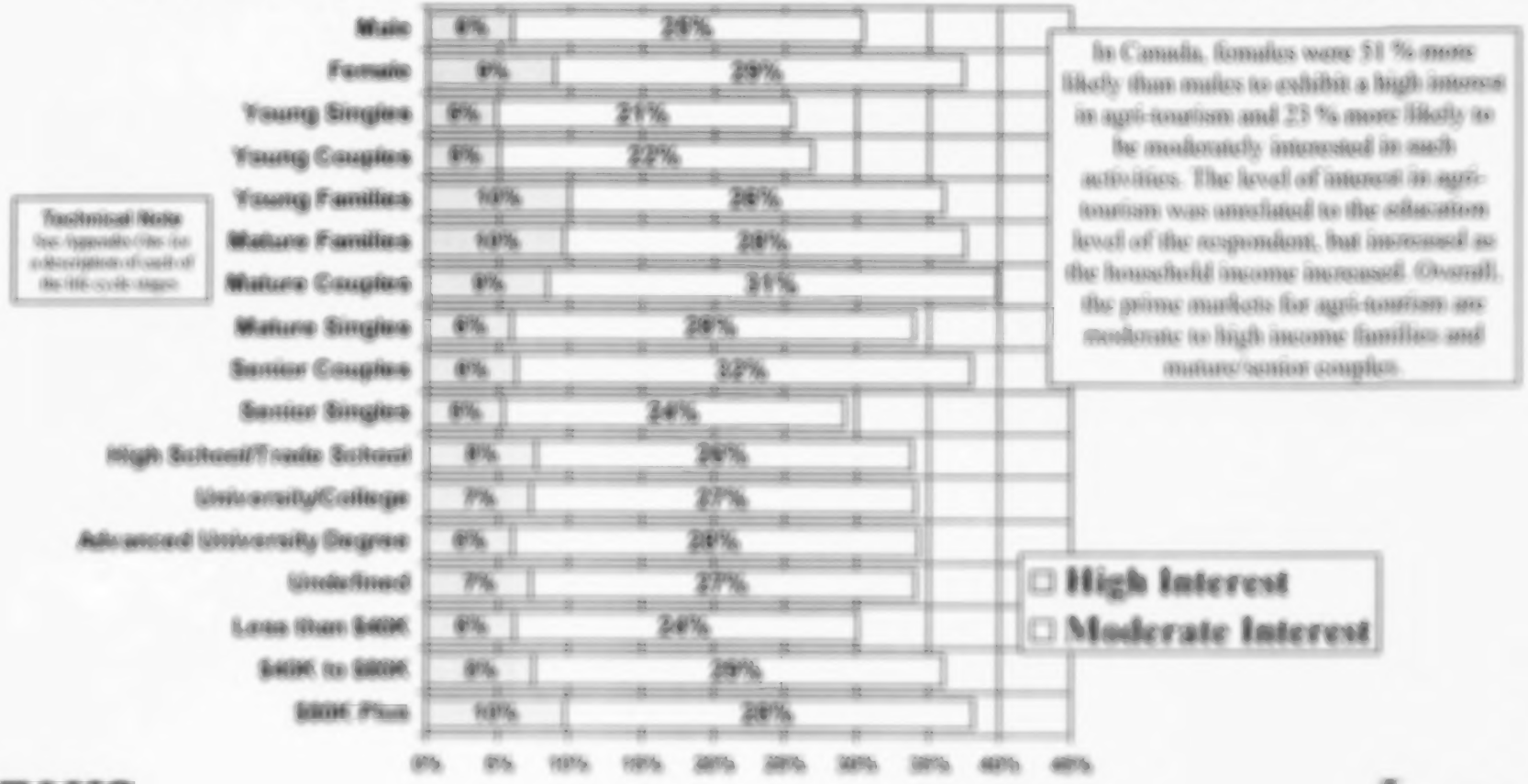
There was less variation in the interest in agri-tourism across the various sectors of the market in the United States relative to Canada. However, mature couples were more likely to exhibit an interest in agri-tourism while travelling than other sectors. The level of interest in agri-tourism also increased as the household income increased. Overall, the prime target markets for agri-tourism in the United States are moderate to high income mature couples.

Interest in Agri-Tourism

Canada: By Demographics

Based on Participation in Agricultural-Related Activities While Travelling in the Past Two Years

Base: *Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years*



Technical Note
See Appendix One for descriptions of each of the life cycle stages

In Canada, females were 51 % more likely than males to exhibit a high interest in agri-tourism and 23 % more likely to be moderately interested in such activities. The level of interest in agri-tourism was unrelated to the education level of the respondent, but increased as the household income increased. Overall, the prime markets for agri-tourism are moderate to high income families and mature/senior couples.

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Interest in Agri-Tourism

United States: By Demographics

Based on Participation in Agricultural-Related Activities While Travelling in the Past Two Years

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years

There was low variation in the interest in agri-tourism across the various sectors of the market in the United States relative to Canada. However, mature couples were more likely to exhibit an interest in agri-tourism while travelling than other sectors. The level of interest in agri-tourism also increased as the household income increased. Overall, the prime target markets for agri-tourism in the United States are moderate to high income mature couples.

Technical Note

See Appendix A for the collection process of each of the Old vs. New topics.

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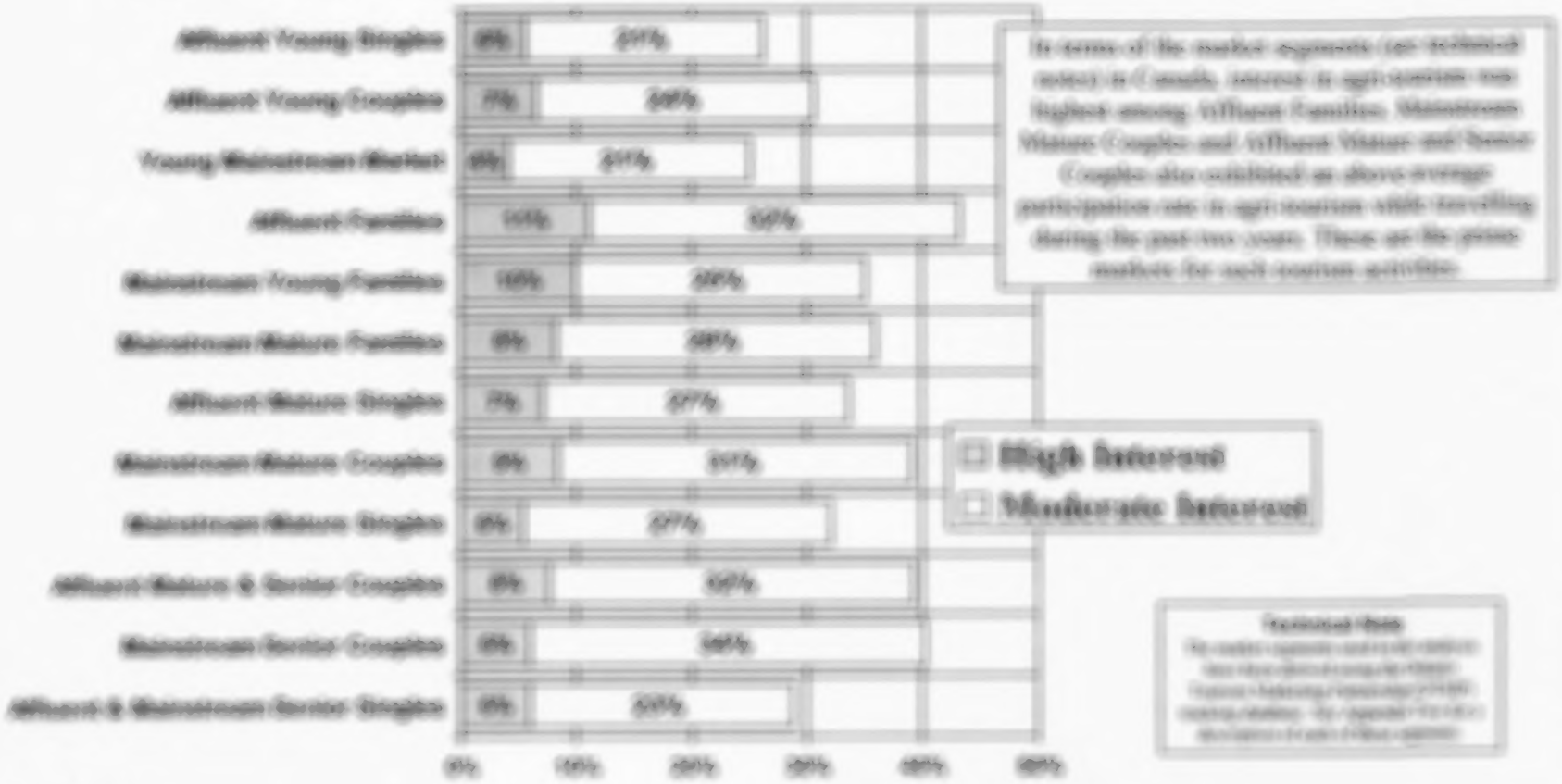
Interest in Agri-Tourism

Canada: By Market Segment

Based on Participation in Agricultural-Related Activities While Travelling in the Past Two Years

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



In terms of the market segments (as defined earlier) in Canada, interest in agri-tourism was highest among Affluent Families, Mainstream Mature Couples and Affluent Mature and Senior Couples also exhibited an above average participation rate in agri-tourism while travelling during the past two years. These are the prime markets for such tourism activities.

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Interest in Agri-Tourism

United States: By Market Segment

Based on Participation in Agricultural-Related Activities While Traveling in the Past Two Years

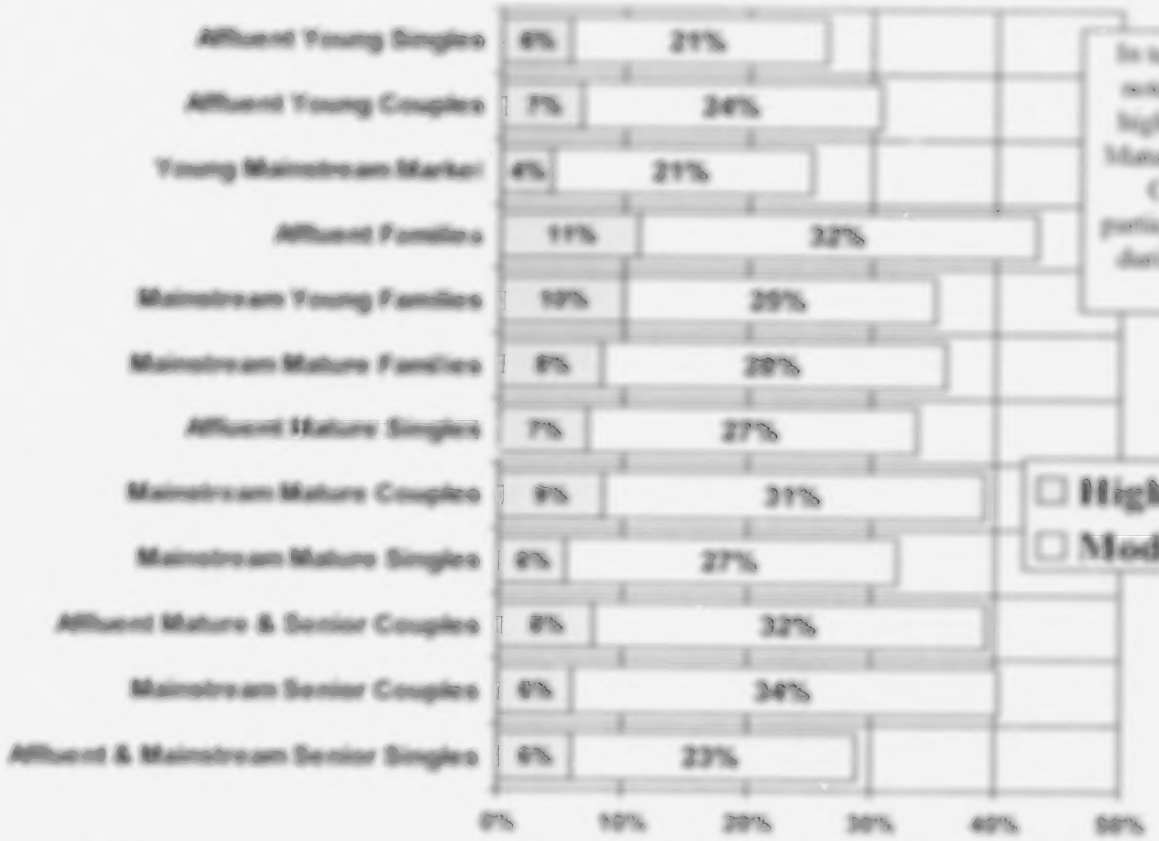
Base: Percent of Population (18 Plus) Who Either Traveled in Last Two Years or Intends to Travel in Next Two Years

A similar pattern was observed in the United States with the Affluent Families and Affluent Mature and Senior Couples most likely to have participated in agri-tourism activities while traveling in the past two years. Mainstream Couples and Affluent Singles also exhibited an above-average interest in such activities in the U.S. market. These represent the prime target markets for agri-tourism.

Canada: By Market Segment

Based on Participation in Agricultural-Related Activities While Travelling in the Past Two Years

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



In terms of the market segments (see technical notes) in Canada, interest in agri-tourism was highest among Affluent Families. Mainstream Mature Couples and Affluent Mature and Senior Couples also exhibited an above average participation rate in agri-tourism while travelling during the past two years. These are the prime markets for such tourism activities.

Technical Note

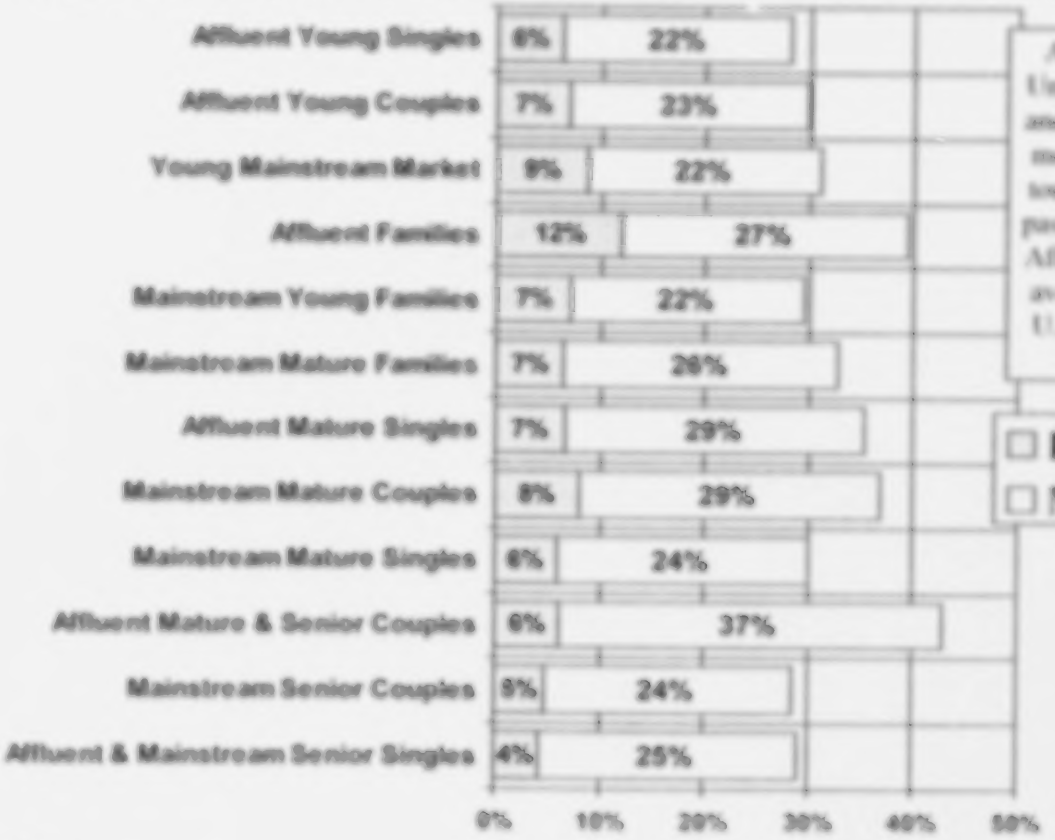
The market segments used in this analysis have been derived using the Ontario Tourism Marketing Partnership (OTMP) tracking database. See Appendix Two for a description of each of these segments.

Interest in Agri-Tourism

United States: By Market Segment

Based on Participation in Agricultural-Related Activities While Travelling in the Past Two Years

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



A similar pattern was observed in the United States with the Affluent Families and Affluent Mature and Senior Couples most likely to have participated in agri-tourism activities while travelling in the past two years. Mainstream Couples and Affluent Singles also exhibited an above average interest in such activities in the U.S. market. These represent the prime target markets for agri-tourism.

Technical Note

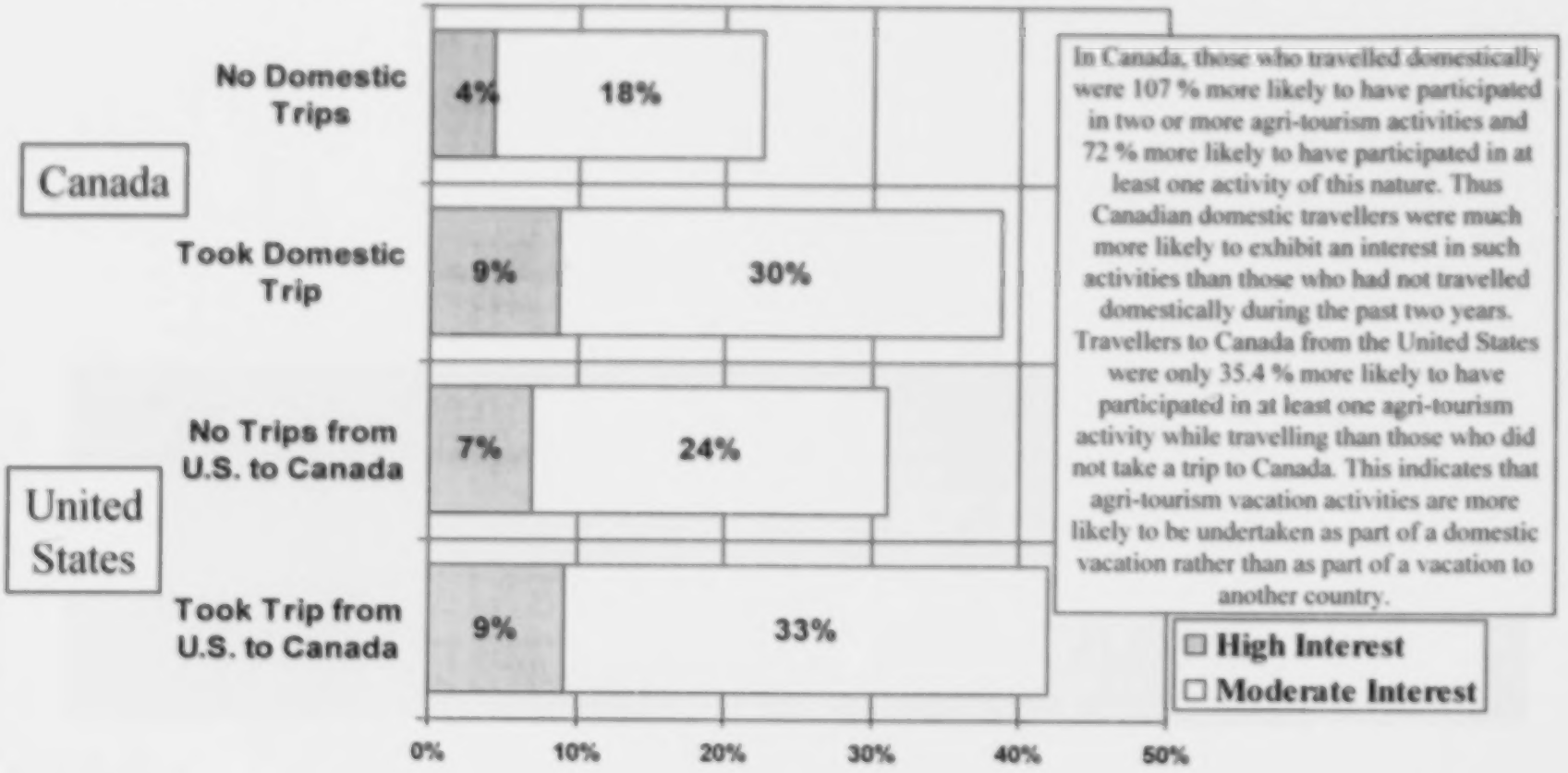
The market segments used in this analysis have been derived using the GVAP tracking database. See Appendix Two for a description of each of these segments.

Interest in Agri-Tourism

Canada vs. U.S.: By Trips in Canada Last Two Years

Based on Participation in Agricultural-Related Activities While Travelling in the Past Two Years

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



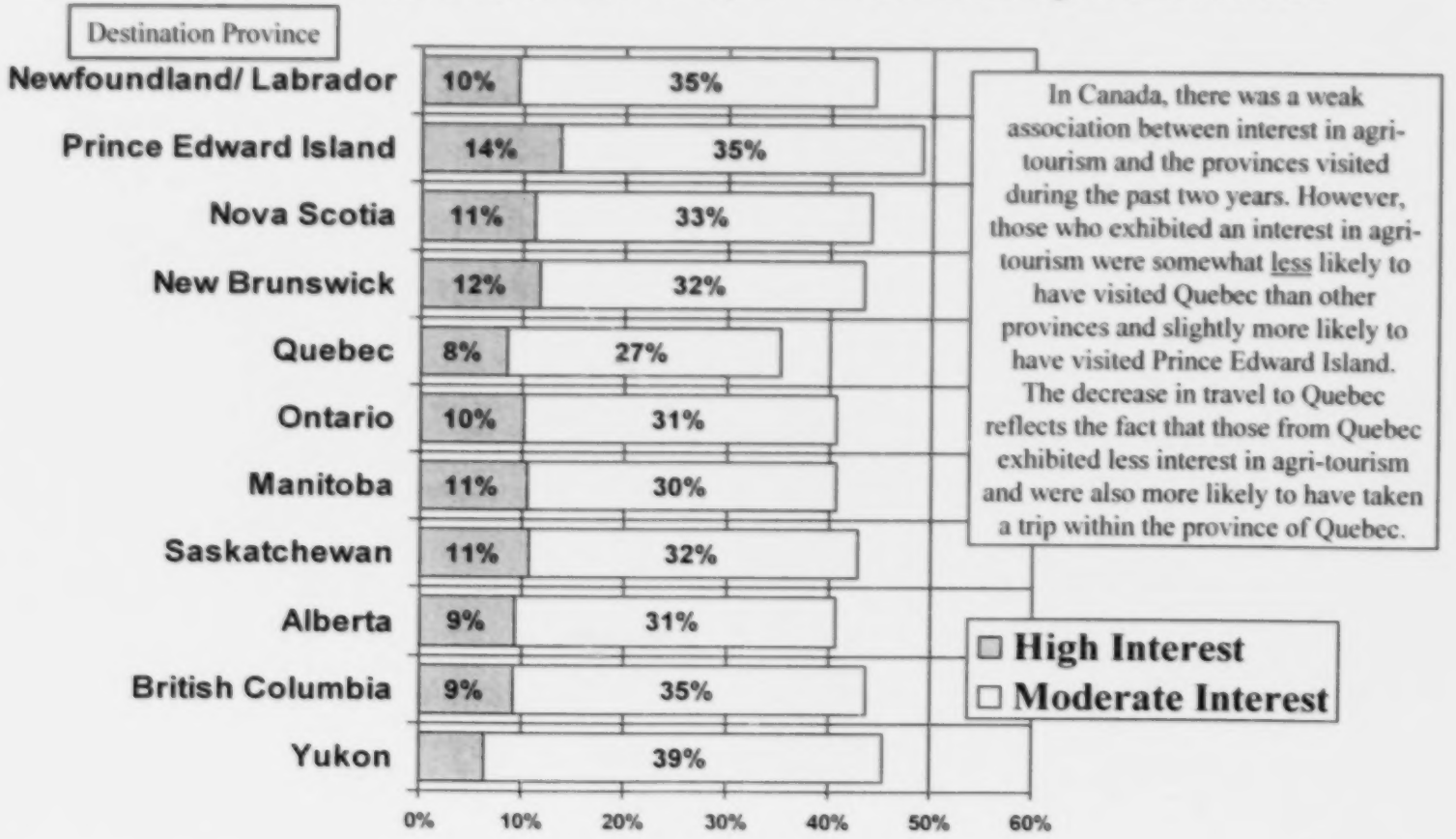
In Canada, those who travelled domestically were 107 % more likely to have participated in two or more agri-tourism activities and 72 % more likely to have participated in at least one activity of this nature. Thus Canadian domestic travellers were much more likely to exhibit an interest in such activities than those who had not travelled domestically during the past two years. Travellers to Canada from the United States were only 35.4 % more likely to have participated in at least one agri-tourism activity while travelling than those who did not take a trip to Canada. This indicates that agri-tourism vacation activities are more likely to be undertaken as part of a domestic vacation rather than as part of a vacation to another country.

Interest in Agri-Tourism

Canada: Interest By Province Travelled To

Based on Participation in Agricultural-Related Activities While Travelling in the Past Two Years

Base: Percent of Population (18 Plus) Who Took a Trip to Each Province During the Last Two Years



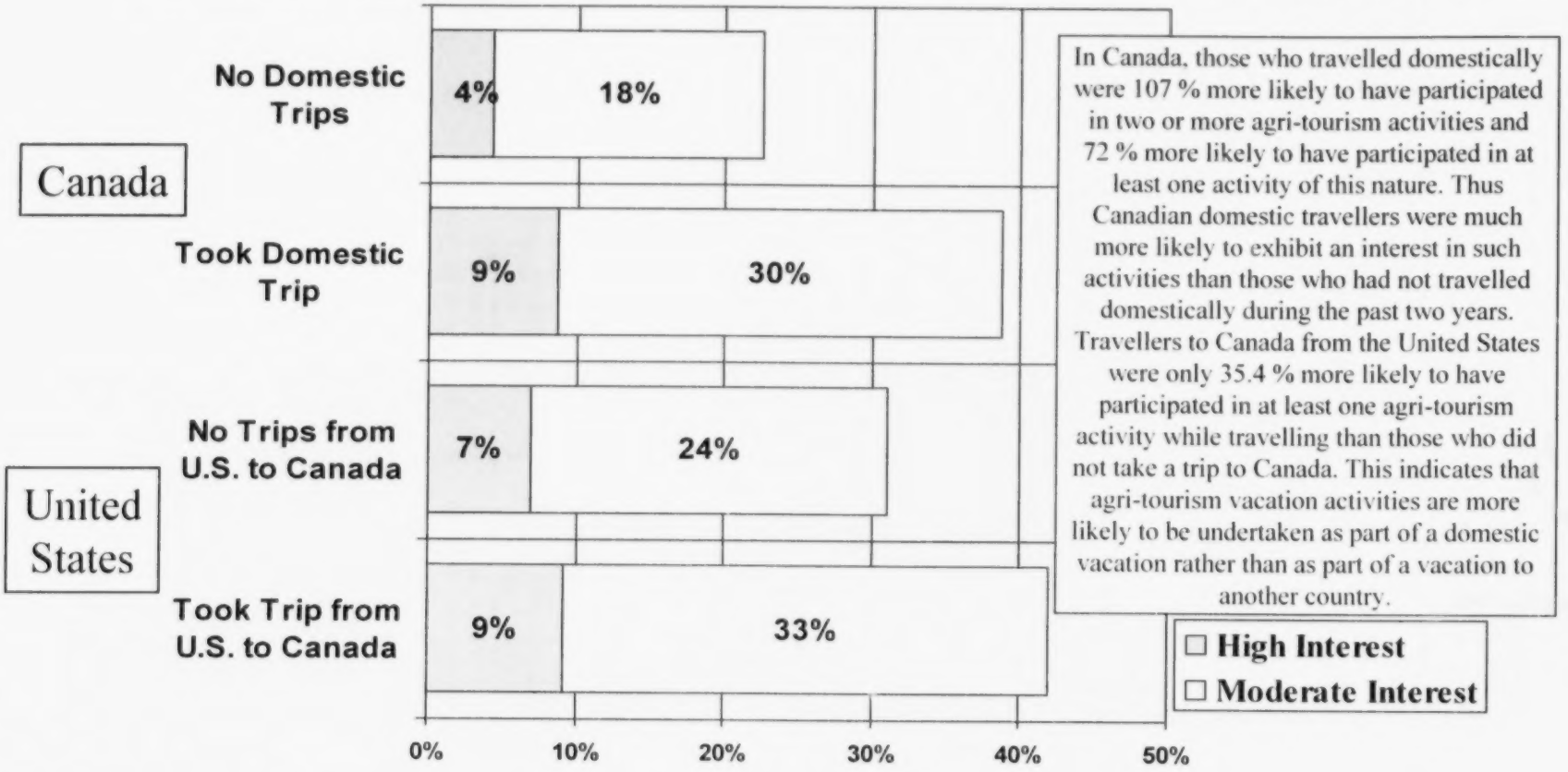
In Canada, there was a weak association between interest in agri-tourism and the provinces visited during the past two years. However, those who exhibited an interest in agri-tourism were somewhat less likely to have visited Quebec than other provinces and slightly more likely to have visited Prince Edward Island. The decrease in travel to Quebec reflects the fact that those from Quebec exhibited less interest in agri-tourism and were also more likely to have taken a trip within the province of Quebec.

Interest in Agri-Tourism

Canada vs. U.S.: By Trips in Canada Last Two Years

Based on Participation in Agricultural-Related Activities While Travelling in the Past Two Years

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



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Interest in Agri-Tourism

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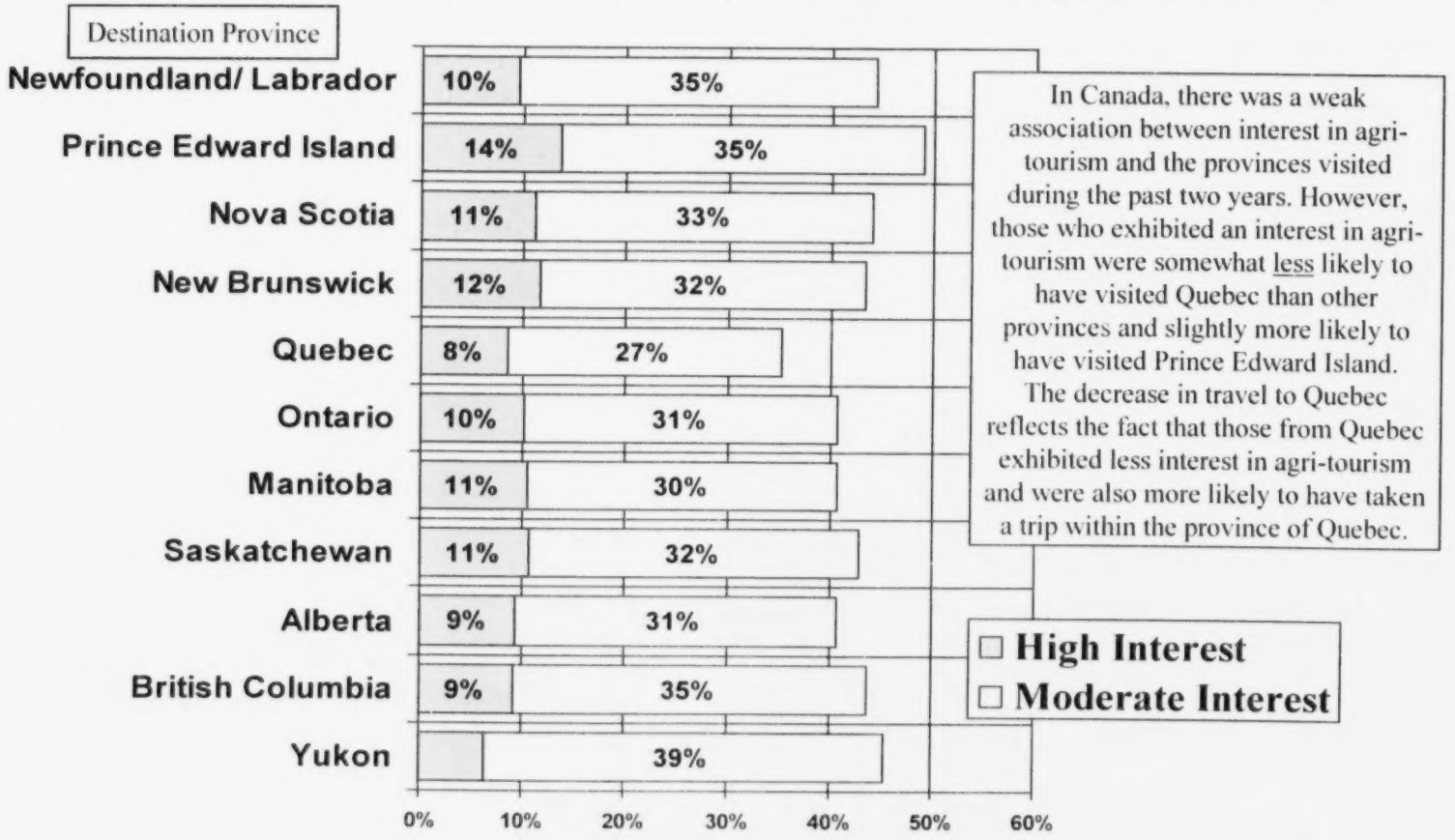
Based on Participation in Agricultural-Related Activities While Travelling in the Past Two Years

Base: Percent of Population (18 Plus) Who Took a Trip to Each Province During the Last Two Years

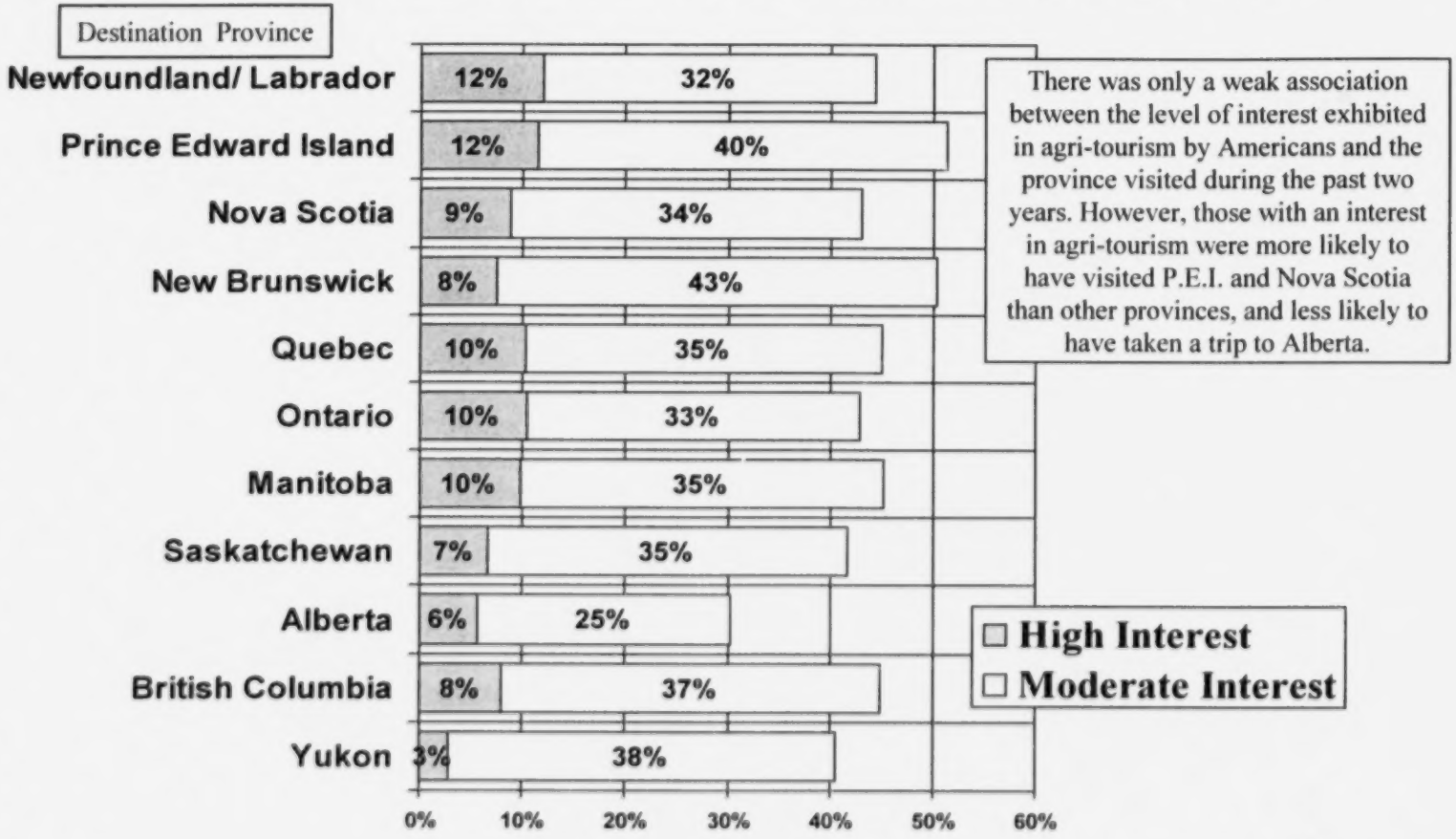


Interest in Agri-Tourism

United States: Interest By Province Travelled To

Based on Participation in Agricultural-Related Activities While Travelling in the Past Two Years

Base: Percent of Population (18 Plus) Who Took a Trip to Each Province During the Last Two Years



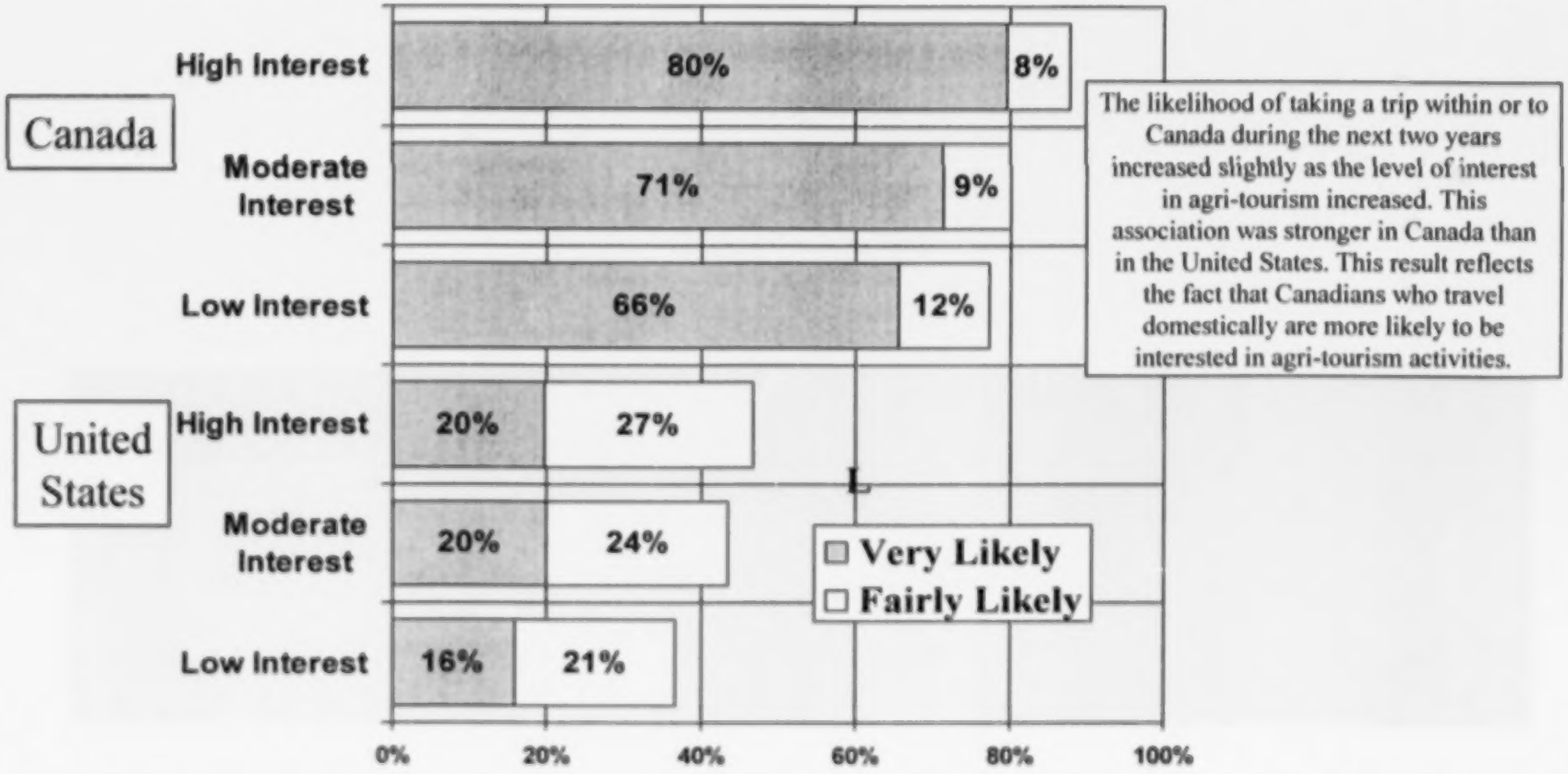
There was only a weak association between the level of interest exhibited in agri-tourism by Americans and the province visited during the past two years. However, those with an interest in agri-tourism were more likely to have visited P.E.I. and Nova Scotia than other provinces, and less likely to have taken a trip to Alberta.

Interest in Agri-Tourism

Intentions to Travel to Canada in Next Two Years

Based on Participation in Agricultural Related Activities While Travelling in the Past Two Years

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



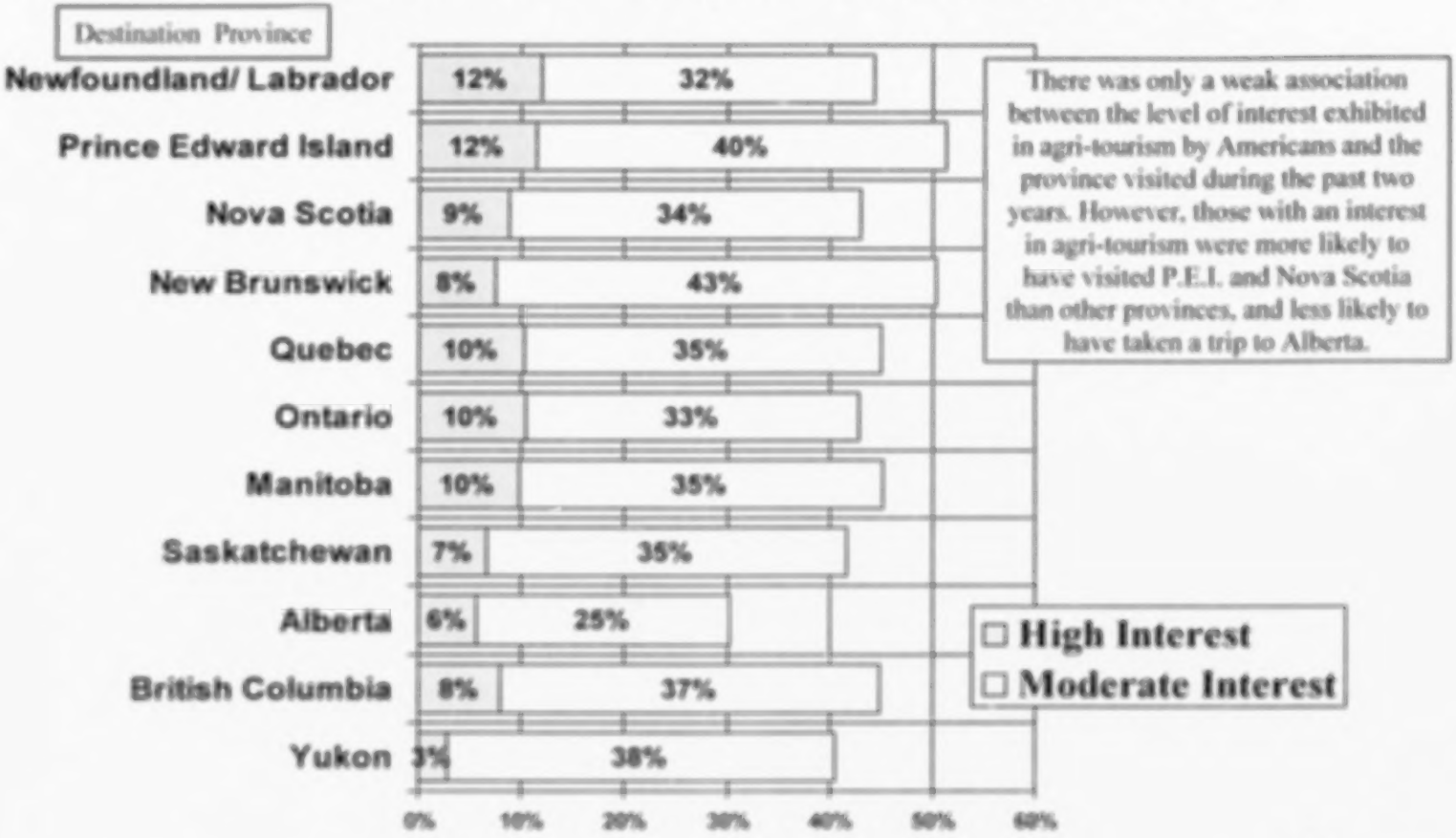
The likelihood of taking a trip within or to Canada during the next two years increased slightly as the level of interest in agri-tourism increased. This association was stronger in Canada than in the United States. This result reflects the fact that Canadians who travel domestically are more likely to be interested in agri-tourism activities.

Interest in Agri-Tourism

United States: Interest By Province Travelled To

Based on Participation in Agricultural-Related Activities While Travelling in the Past Two Years

Base: Percent of Population (18 Plus) Who Took a Trip to Each Province During the Last Two Years

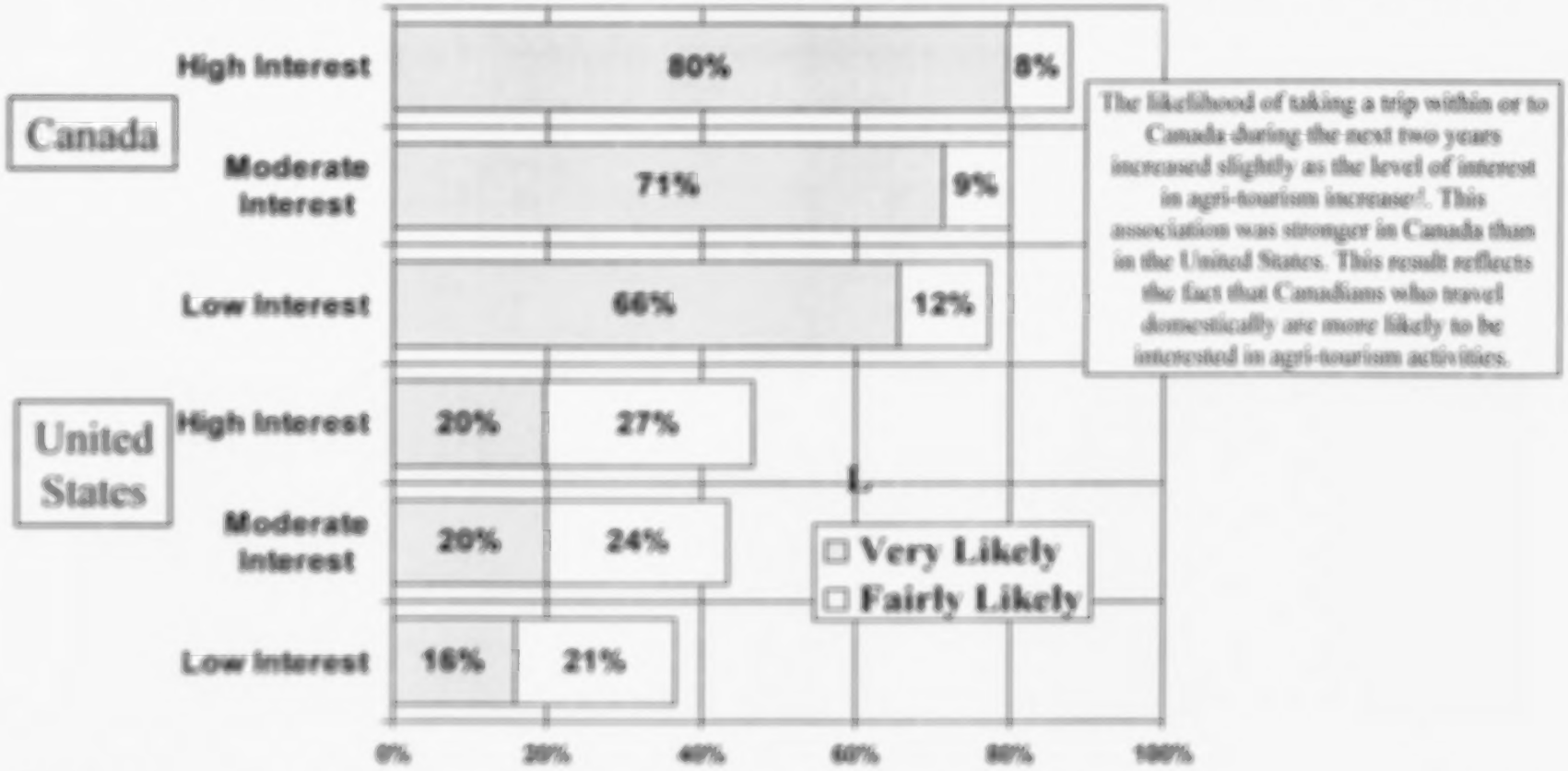


Interest in Agri-Tourism

Intentions to Travel to Canada in Next Two Years

Based on Participation in Agricultural Related Activities While Travelling in the Past Two Years

Base: Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years

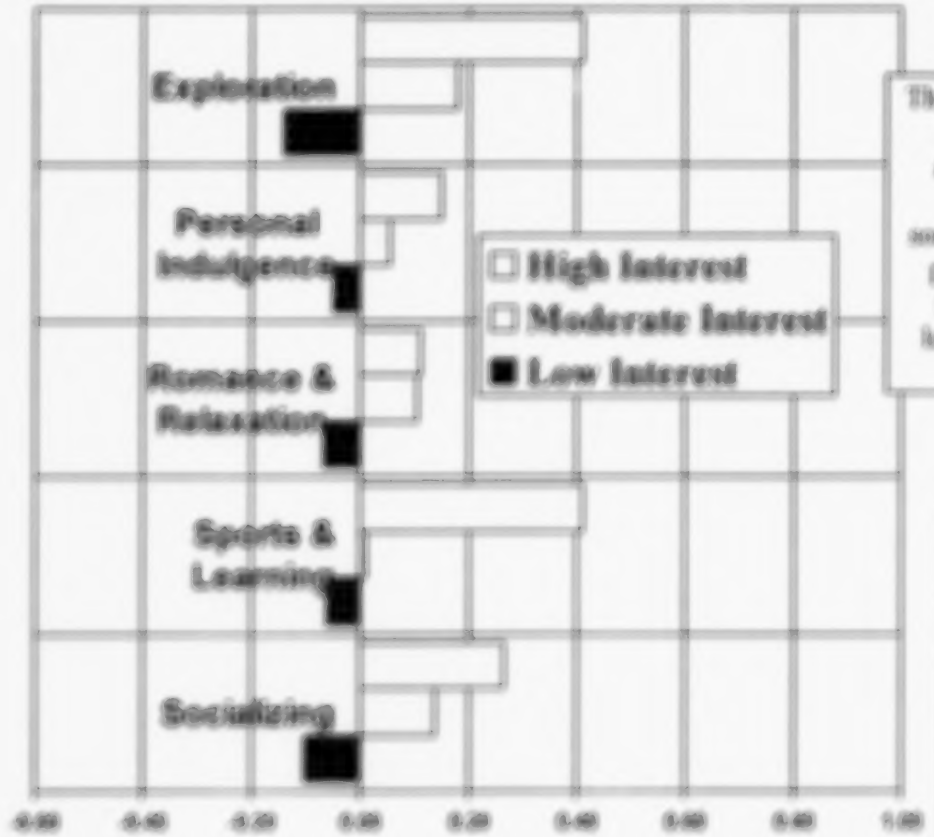


The likelihood of taking a trip within or to Canada during the next two years increased slightly as the level of interest in agri-tourism increased. This association was stronger in Canada than in the United States. This result reflects the fact that Canadians who travel domestically are more likely to be interested in agri-tourism activities.

General Vacation Experiences Sought During Pleasure Travel in the Past Two Years

By Interest in Agri-Tourism Based on Participation While Travelling in Past Two Years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Those with a high interest in agri-tourism were more likely to have sought out vacation experiences associated with exploration, sports and learning (e.g., to participate in a hobby or sport), and socializing with family and friends. Advertising and promotional materials designed to promote agri-tourism should emphasize the opportunities for learning and the ability to spend quality time with one's spouse/partner or children.

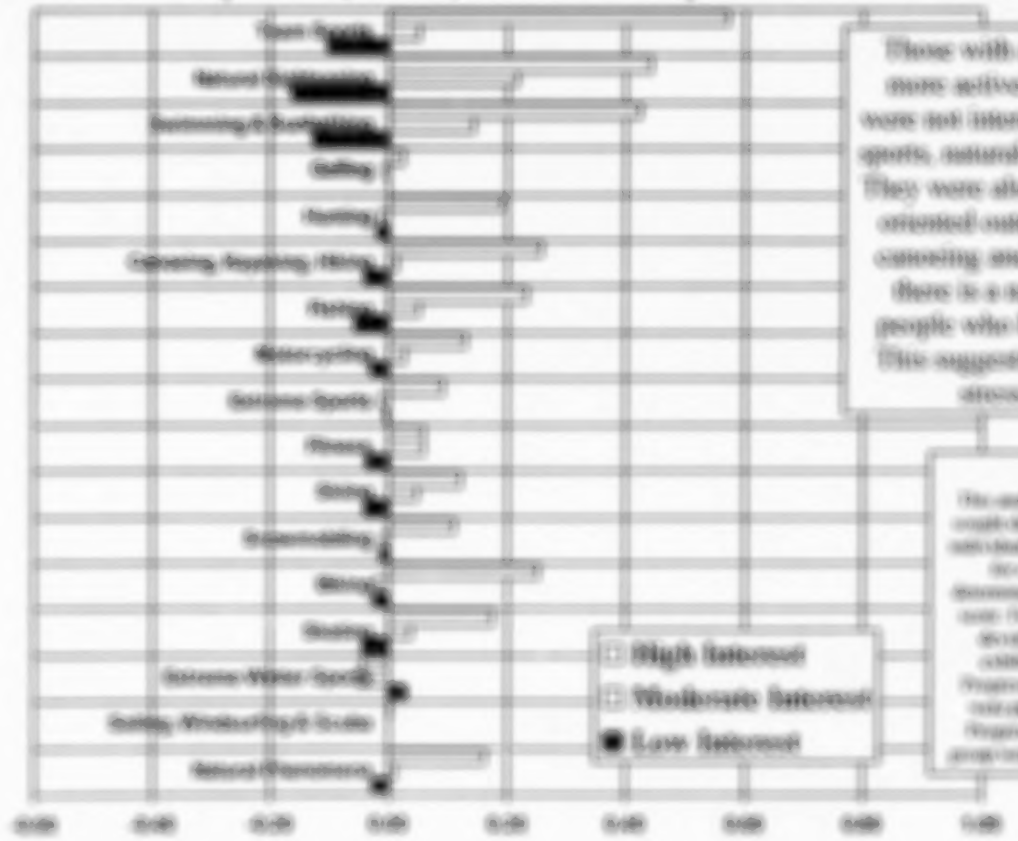
Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of '0' and a standard deviation of '1'. A value of '0' means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past Two Years

By Interest in Agri-Tourism Based on Participation While Travelling in Past Two Years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



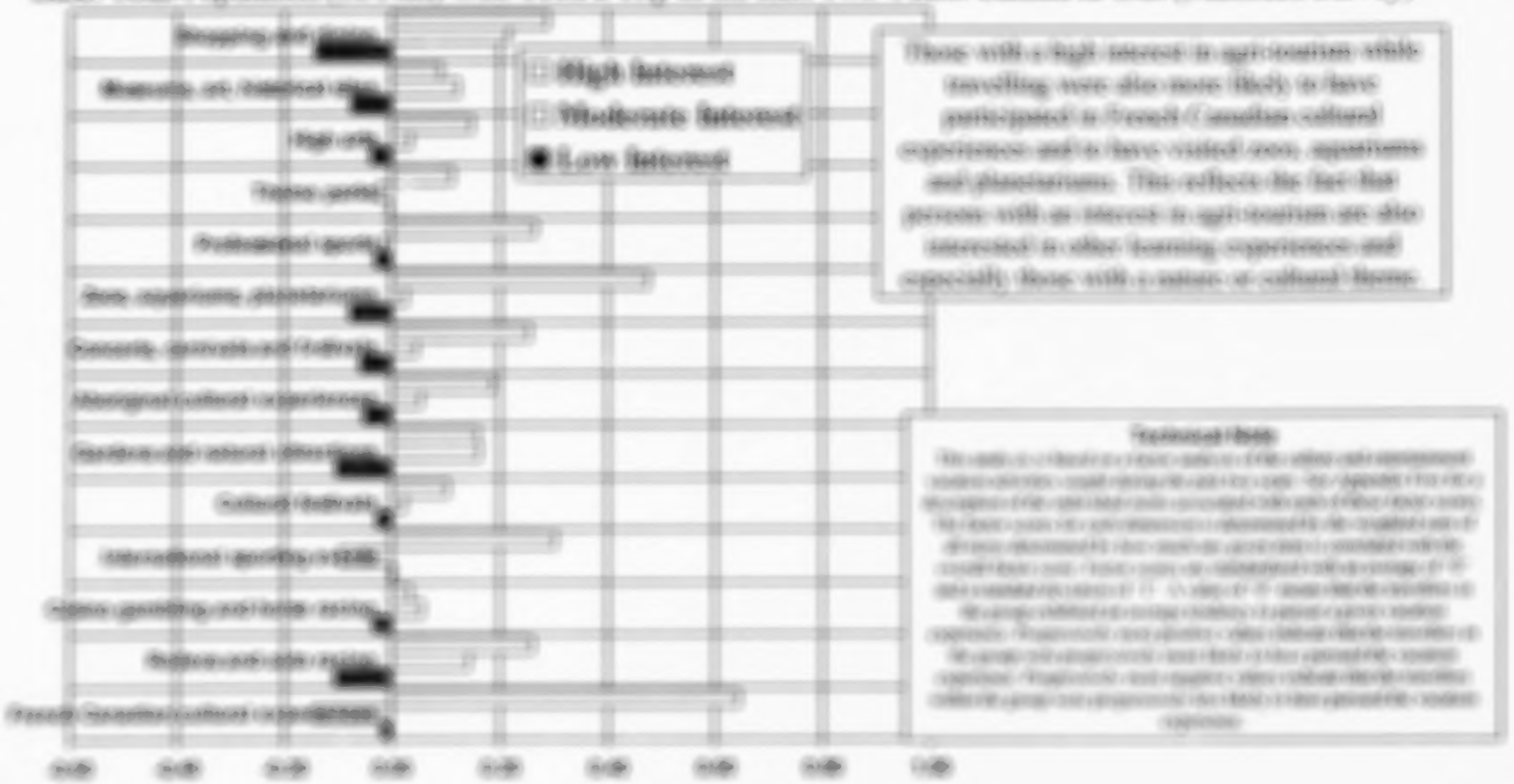
Those with a high interest in agri-tourism tended to be more active in most outdoor activities than those who were not interested. This was especially apparent for team sports, natural sightseeing, and swimming and sunbathing. They were also more likely to have participated in nature-oriented outdoor activities such as hunting and fishing, canoeing and kayaking, and hiking and biking. Clearly, there is a nature theme in those activities pursued by people who have participated in agri-tourism activities. This suggests that the promotion of agri-tourism should stress opportunities to experience nature.

Technical Note

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past Two Years

By Interest in Agri-Tourism Based on Participation While Travelling in Past Two Years

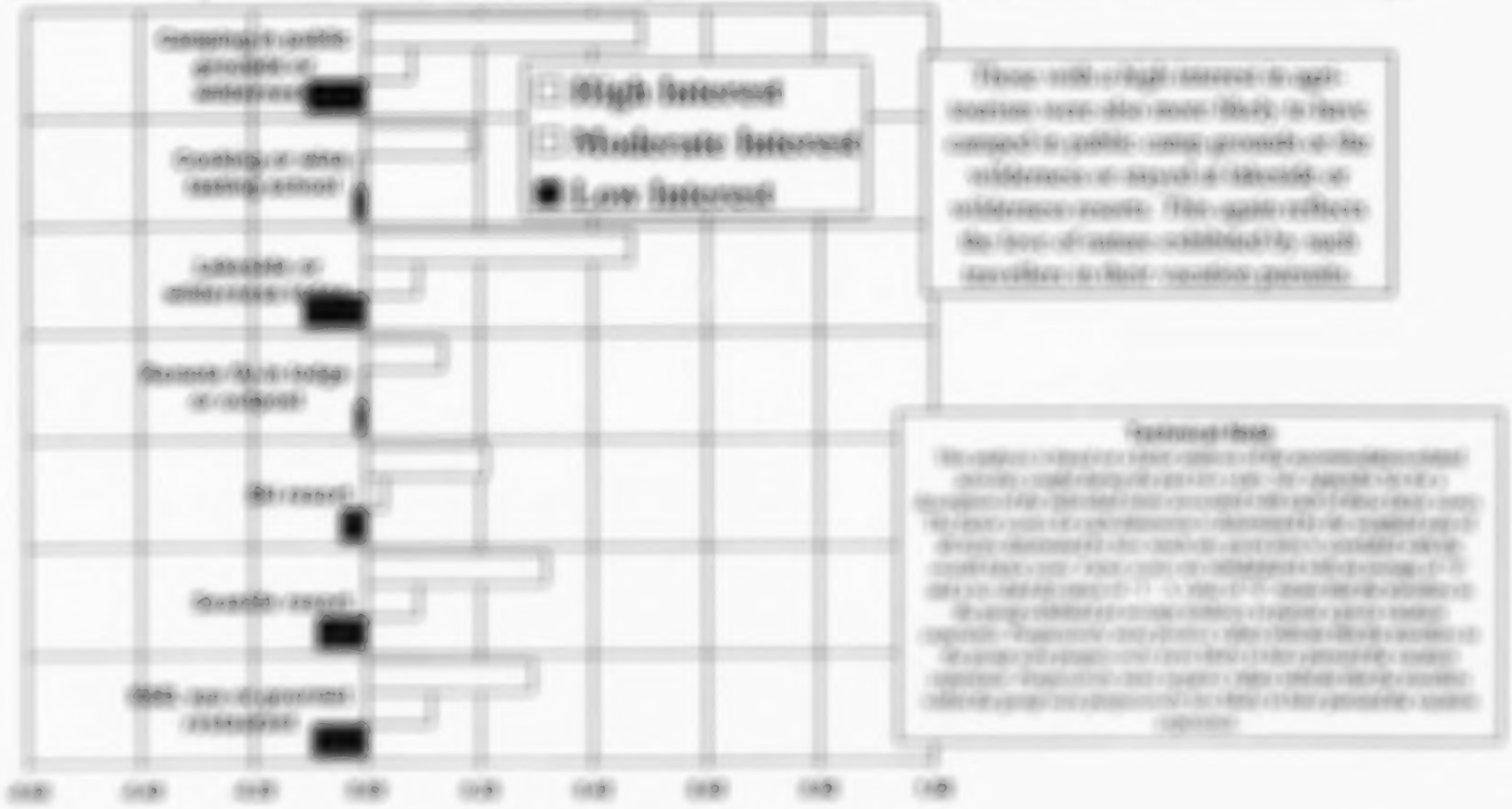
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Canada & U.S. (Multimode Survey)



Accommodation-Related Activities Sought During Pleasure Travel in the Past Two Years

By Interest in Agri-Tourism Based on Participation While Travelling in Past Two Years

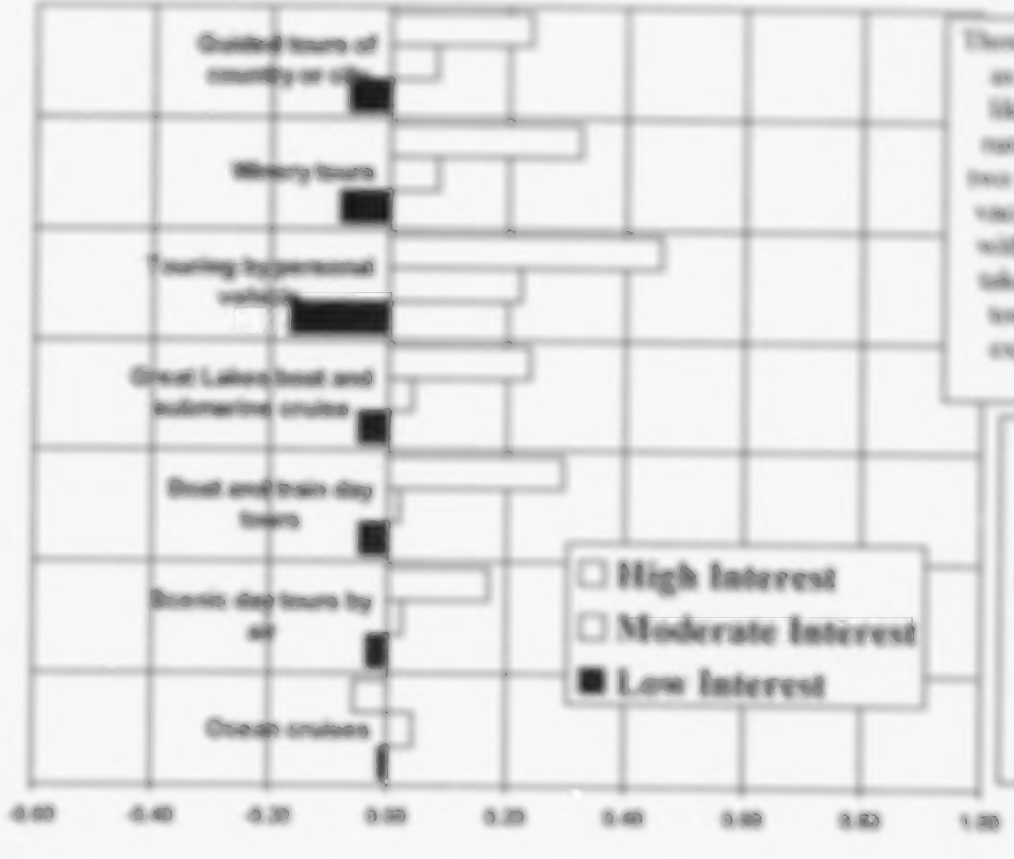
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Multiclient Survey)



Day and Overnight Touring Activities in the Past Two Years

By Interest in Agri-Tourism Based on Participation While Travelling in Past Two Years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Those with a high interest in agri-tourism, as well as those with a moderate interest, were more likely to have taken tours of small towns and rural areas by personal vehicle during the past two years, reflecting their interest in exploratory vacation experiences with a rural theme. Those with a high interest were also more likely have taken guided tours of the country or city., wine tours as well as other types of tours. Clearly, exploration is an important dimension to the vacation activities of these travellers.

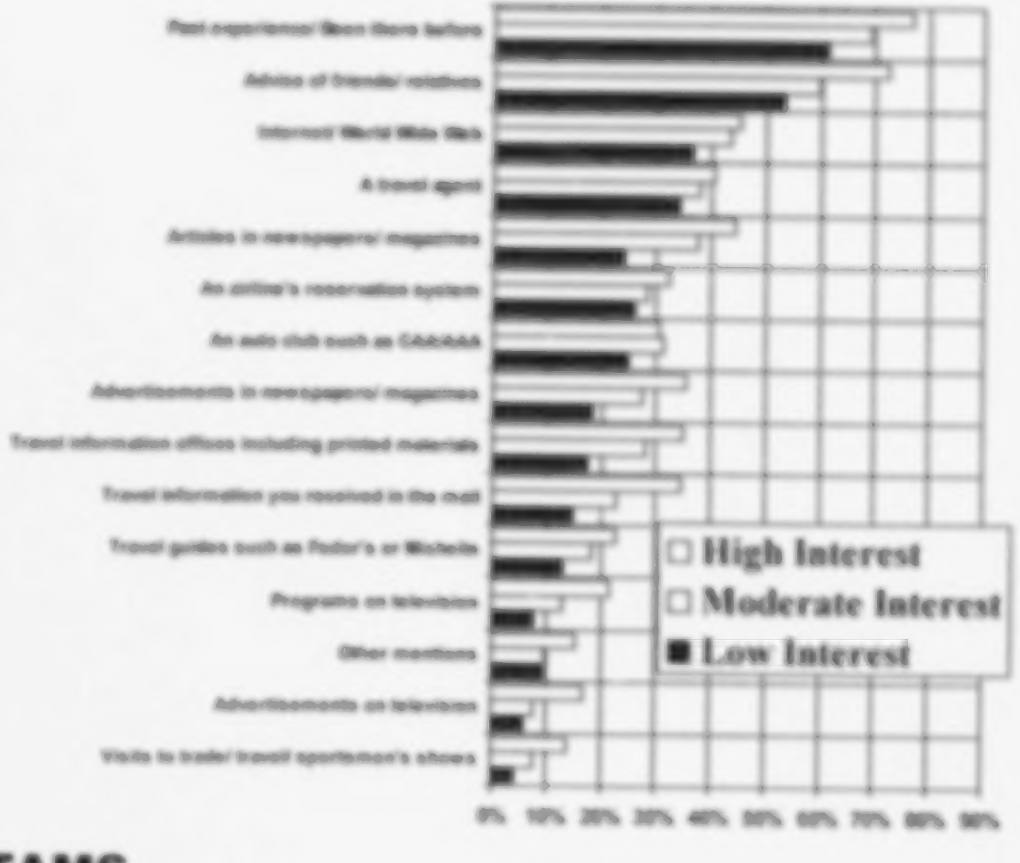
Technical Note

This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension is determined by the weighted sum of all items determined by how much any given item is correlated with the overall factor score. Factor scores are standardized with an average of '0' and a standard deviation of '1'. A value of '0' means that the travellers in this group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Sources of Information Consulted to Plan Brief Vacations

By Interest in Agri-Tourism Based on Participation While Travelling in Past Two Years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

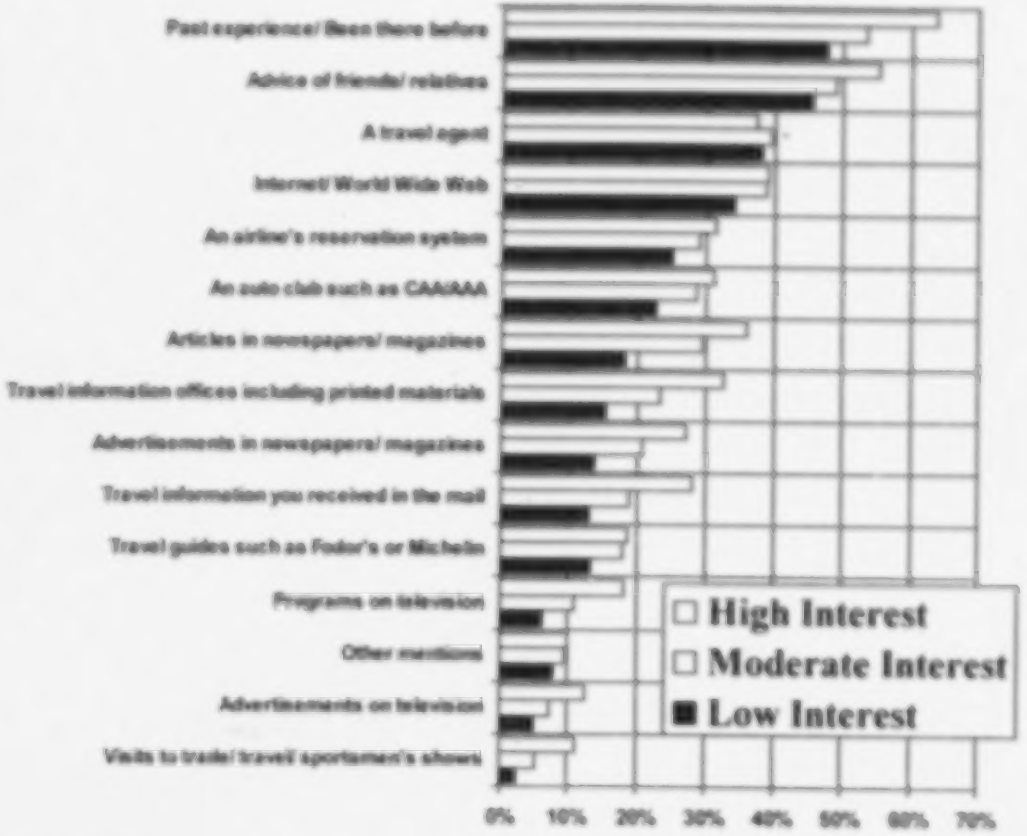

Past experience/ Been there before
Advice of friends/ relatives
Internet/ World Wide Web
A travel agent
Articles in newspapers/ magazines
An airline's reservation system
An auto club such as CAA/AAA
Advertisements in newspapers/ magazines
Travel information offices including printed materials
Travel information you received in the mail
Travel guides such as Fodor's or Michelin
Programs on television
Other mentions
Advertisements on television
Visits to trade/ travel sportsmen's shows
High Interest
Moderate Interest
Low Interest
0% 10% 20% 30% 40% 50% 60% 70% 80% 90%

Those with a high interest in agri-tourism were more likely to rely on the advice of family and friends than others when planning brief vacations. They also consulted a larger variety of information sources when planning their brief vacations and especially newspaper and magazine articles/advertising, travel information obtained from travel bureaus, travel information received in the mail and travel guides. Those with a moderate interest in agri-tourism also consulted a larger variety of information sources when planning brief vacations than those with low interest, but fewer information sources than those with a high interest. The reliance on print materials when planning vacations suggests that agri-tourism is best promoted through print media, travel guides and direct mail campaigns.

Sources of Information Consulted to Plan Longer Vacations

By Interest in Agri-Tourism Based on Participation While Travelling in Past Two Years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

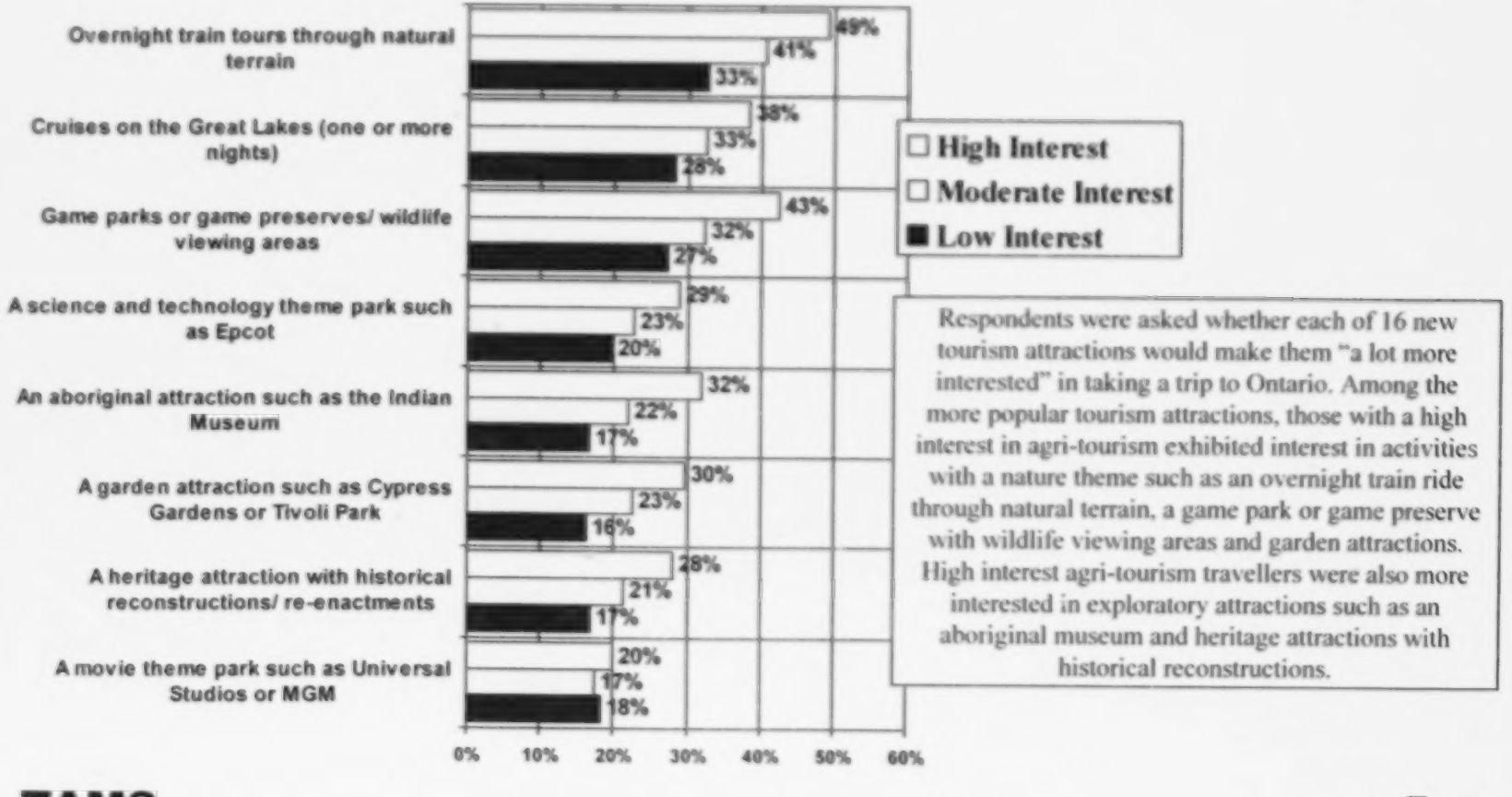


Those with a high interest in agri-tourism were more likely to rely on the advice of family and friends when planning longer vacations as well. They were also more likely to consult newspaper and magazine articles and advertising, travel information obtained from travel bureaus, travel information received in the mail, travel guides, trade shows and television programs. Those with a moderate interest in agri-tourism also consulted a larger variety of information sources when planning longer vacations than those with low interest, but fewer information sources than those with a high interest. As with brief vacations, the heavy use of newspaper and print materials when planning vacations suggests that agri-tourism is best promoted through print media, travel guides and direct mail campaigns.

Interest in New Tourism Products

By Interest in Agri-Tourism Based on Travel Activities (Part One of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

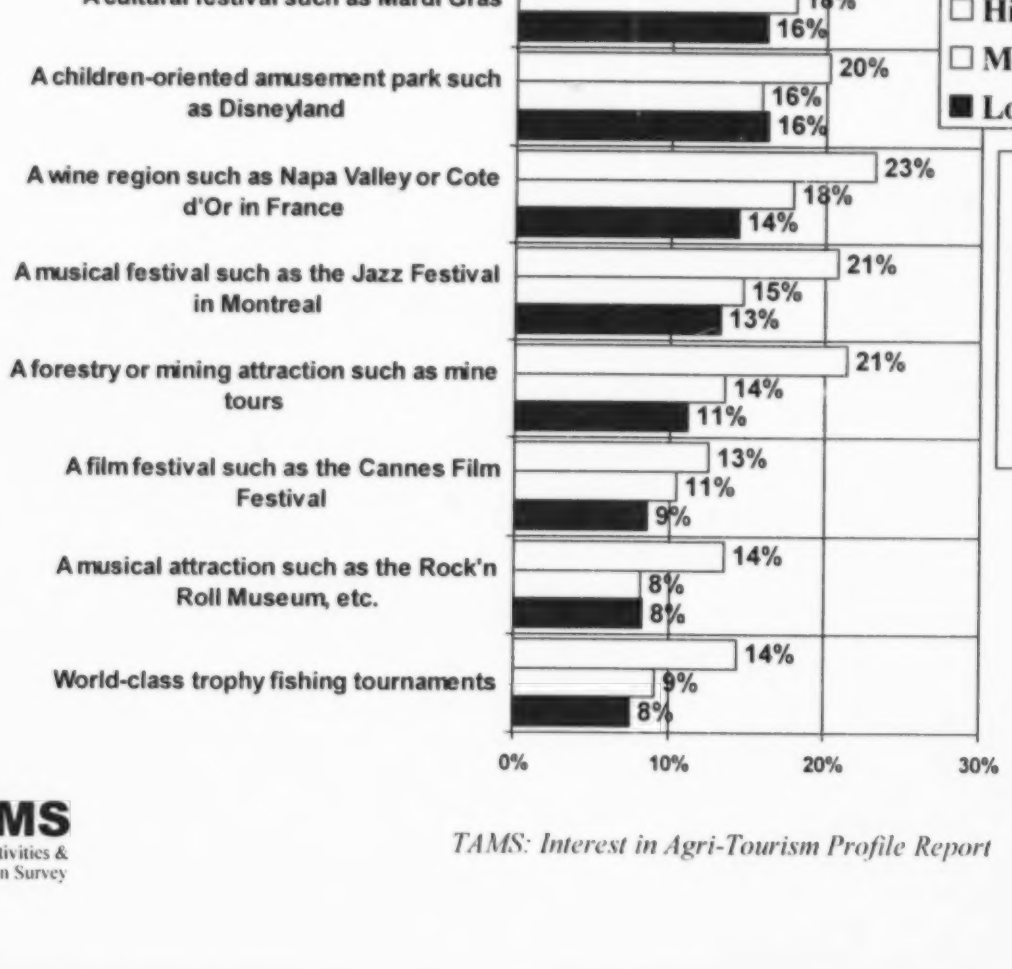


Respondents were asked whether each of 16 new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. Among the more popular tourism attractions, those with a high interest in agri-tourism exhibited interest in activities with a nature theme such as an overnight train ride through natural terrain, a game park or game preserve with wildlife viewing areas and garden attractions. High interest agri-tourism travellers were also more interested in exploratory attractions such as an aboriginal museum and heritage attractions with historical reconstructions.

Interest in New Tourism Products

By Interest in Agri-Tourism Based on Travel Activities (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

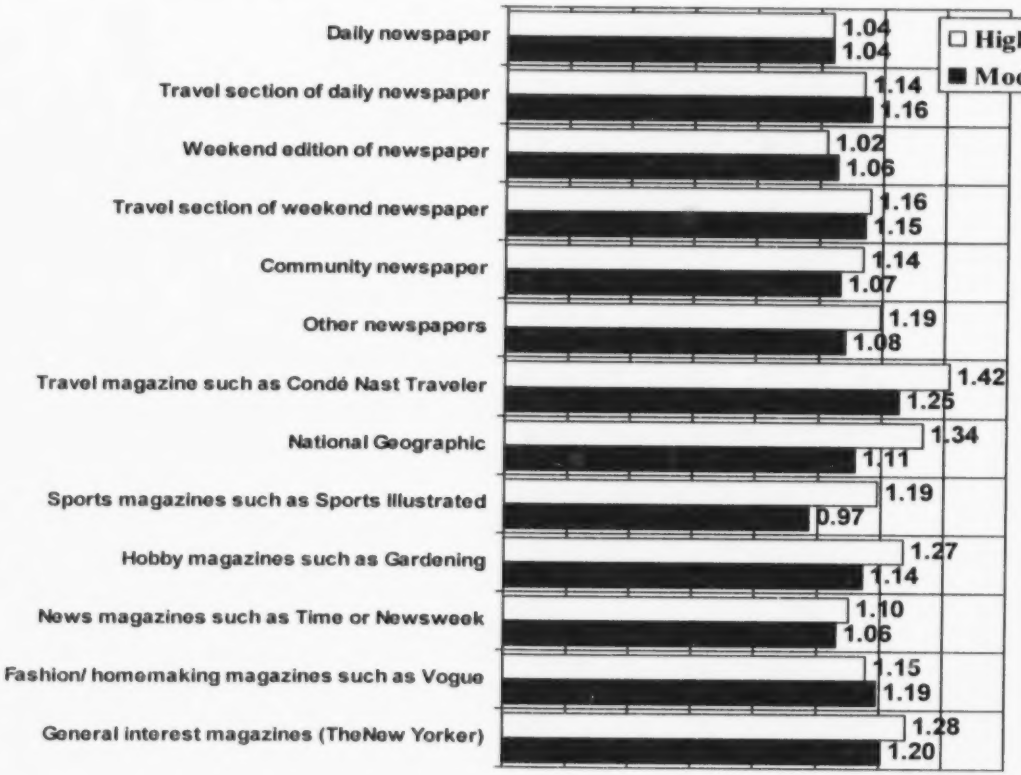


Among the tourism attractions which were somewhat less popular overall, those with a high interest in agri-tourism were also more likely to be interested in wine tours, musical festivals, forestry and mining tours, and world-class fishing tournaments. Clearly, these types of travellers are attracted to events and attractions that will give them interesting and unusual vacation experiences.

Media Index for Print Media: Canada & United States

By Interest in Agri-Tourism Based on Travel Activities in Past Two Years

Percent Reading Each Publication Type Among Those With an Interest in Agri-Tourism
By Percent Reading Each Type of Publication in General Market
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for various types of print media (see Technical Note below) suggests that travel magazines, the travel section of the newspaper, National Geographic, hobby magazines and general interest magazines are the most efficient channels to reach those with a high interest in agri-tourism. These same print media sources are generally efficient ways to promote agri-tourism to those with a moderate interest in such activities.

Technical Note

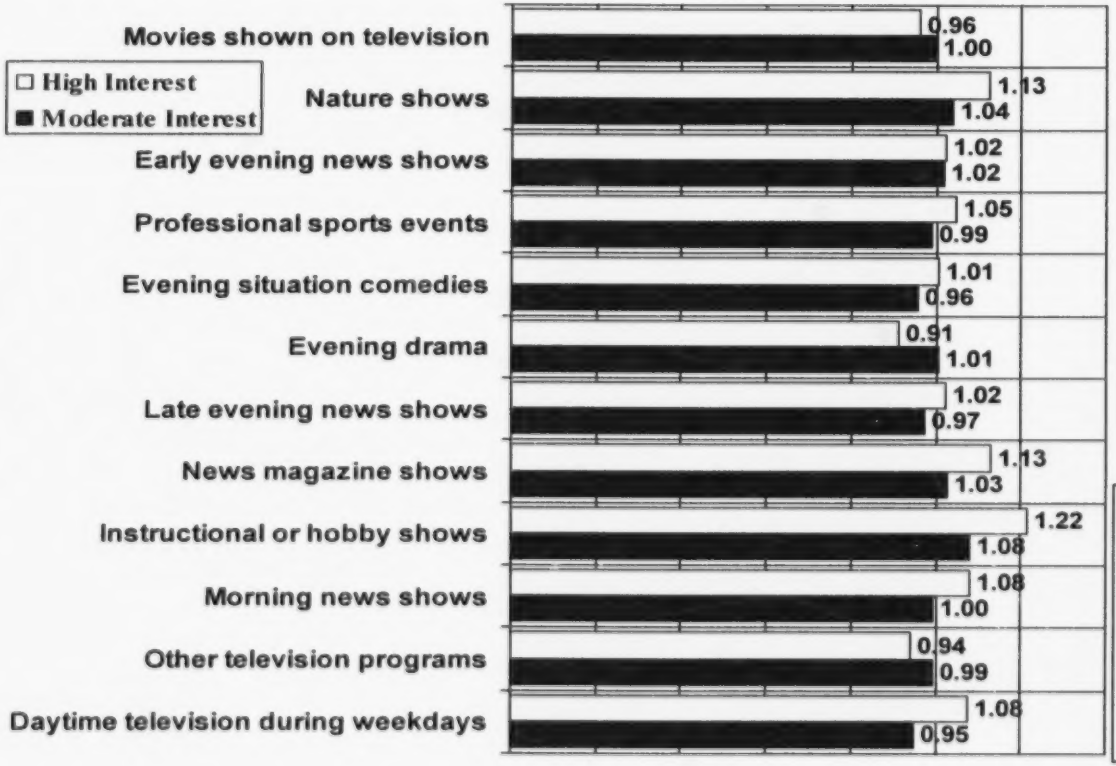
The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that people who are very interested in agri-tourism were 20 % more likely to read a particular publication than the general adult population.

Media Index for Television Programs: Canada & United States

By Interest in Agri-Tourism Based on Travel Activities in Past Two Years

Percent Watching Each Type of Television Program Among Those With an Interest in Agri-Tourism By Percent Watching Each Program Type in General Market

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)


High Interest
Moderate Interest
Movies shown on television 0.96 1.00
Nature shows 1.13 1.04
Early evening news shows 1.02 1.02
Professional sports events 1.05 0.99
Evening situation comedies 1.01 0.96
Evening drama 0.91 1.01
Late evening news shows 1.02 0.97
News magazine shows 1.13 1.03
Instructional or hobby shows 1.22 1.08
Morning news shows 1.08 1.00
Other television programs 0.94 0.99
Daytime television during weekdays 1.08 0.95

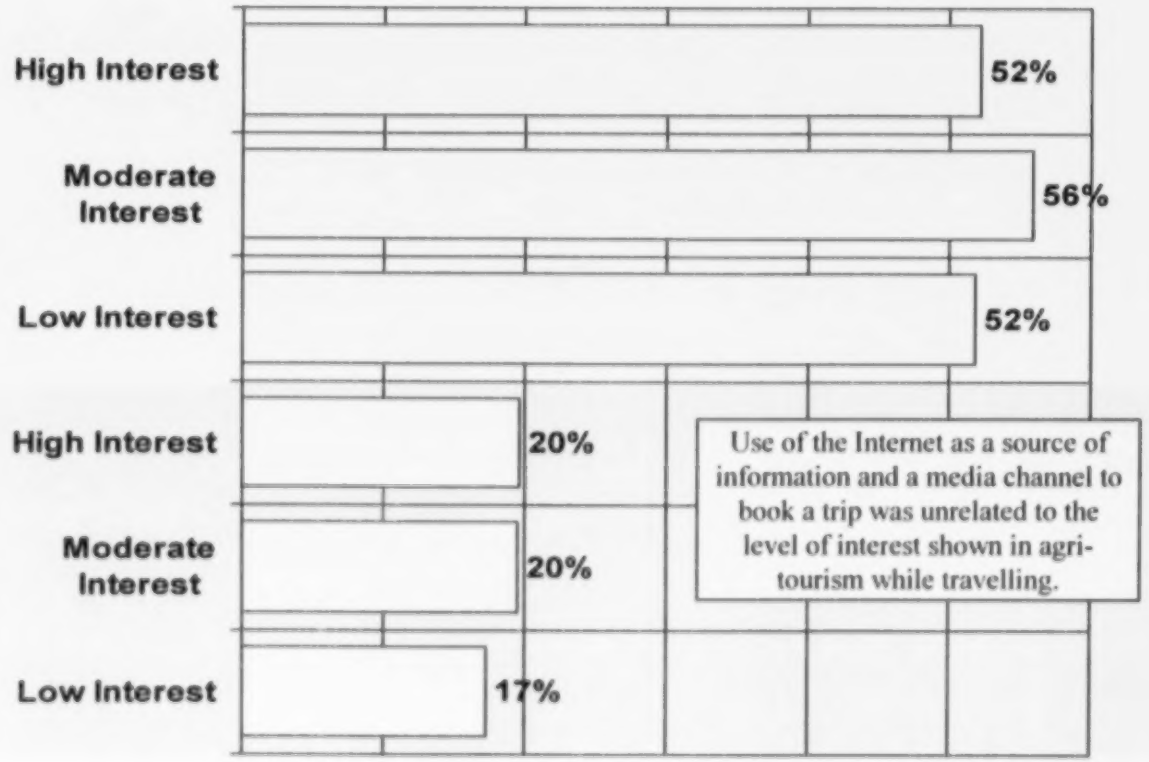
Those with a high interest in agri-tourism are more likely to watch instructional and hobby shows as well as nature shows, outcomes consistent with their interest in learning and nature.

Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that people who are very interested in agri-tourism were 20 % more likely to read a particular publication than the general adult population.

Percent Using Internet and Booking At Least One Trip Using the Internet
By Interest in Agri-Tourism

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)


High Interest
52%
Moderate Interest
56%
Low Interest
52%
High Interest
20%
Moderate Interest
20%
Low Interest
17%
Use of the Internet as a source of information and a media channel to book a trip was unrelated to the level of interest shown in agri-tourism while travelling.
Uses Internet For Research (Any Topic)
Booked Trip Using Internet (Last Two Years)

Destination Image Mapping

- Technical Explanation -

Respondents were asked to assess the image of Canada and Ontario on a 10-point rating scale for 25 image attributes. These ratings were factor analysed to identify general image dimensions upon which Canada and Ontario were evaluated (See Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is found in the upper left quadrant it is considered to offer excellent opportunities to experience culture and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is found in the lower right quadrant, it is considered to offer excellent opportunities to experience nature and participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is found in the upper right quadrant, it is perceived as a hybrid destination offering opportunities for both nature/outdoor experiences and culture/entertainment experiences. On the other hand, when Canada or Ontario is found in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.

Culture & Entertainment Only
Culture/ Entertainment & Nature/Outdoor Activities
Hybrid Destination
Neither Culture/ Entertainment nor Nature/Outdoor Activities
Nature & Outdoor Activities Only
Undefined Destination
Destination Offers Opportunities for Culture & Entertainment ---->
Destination Offers Opportunities for Nature & Outdoor Activities --->

Canadian Vacation Imagery

By Interest in Agri-Tourism Based on Travel Activities in Past Two Years

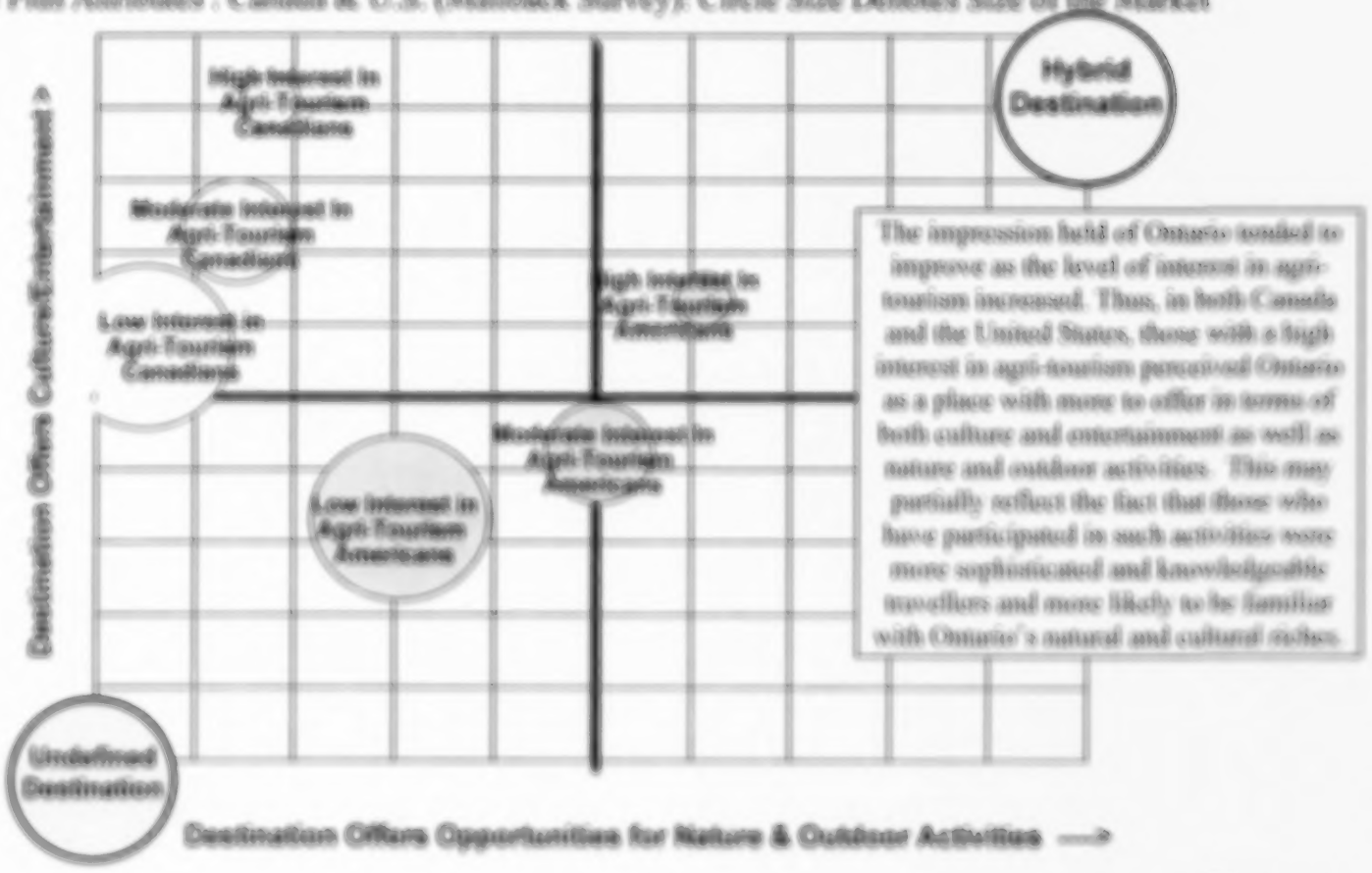
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Canada On One Plus Attributes : Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Market

Moderate Interest in Agri-Tourism Canadians
High Interest in Agri-Tourism Canadians
Hybrid Destination
Low Interest in Agri-Tourism Canadians
High Interest in Agri-Tourism Americans
Those with a high interest in agri-tourism while travelling generally had a more positive impression of Canada than those with a moderate or low interest. This was especially apparent among Americans as those with a high interest in agri-tourism were much more likely to view Canada as having a lot to offer in the way of culture and entertainment, compared with other Americans. Among Canadians, those with a high interest in agri-tourism were more likely to view Canada as having more to offer in the way of nature and outdoor activities than those with a moderate or low interest in agri-tourism.
Low Interest in Agri-Tourism Americans
Moderate Interest in Agri-Tourism Americans
Undefined Destination
Destination Offers Culture/Entertainment >
Destination Offers Opportunities for Nature & Outdoor Activities --->

Ontario Vacation Imagery

By Interest in Agri-Tourism Based on Travel Activities in Past Two Years

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Ontario On One Plus Attributes : Canada & U.S. (Mailback Survey); Circle Size Denotes Size of the Market

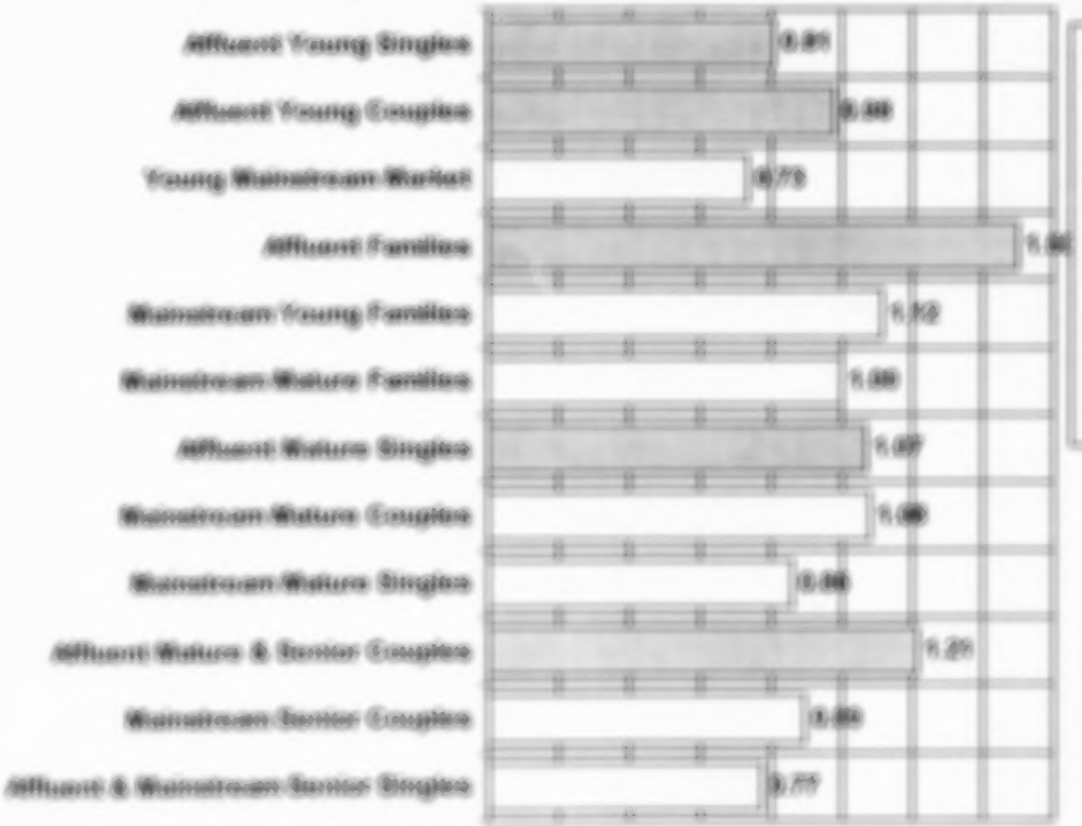

High Interest in Agri-Tourism Canadians
Moderate Interest in Agri-Tourism Canadians
Low Interest in Agri-Tourism Canadians
High Interest in Agri-Tourism Americans
Moderate Interest in Agri-Tourism Americans
Low Interest in Agri-Tourism Americans
Hybrid Destination
Undefined Destination
Destination Offers Culture/Entertainment
Destination Offers Opportunities for Nature & Outdoor Activities
The impression held of Ontario tended to improve as the level of interest in agri-tourism increased. Thus, in both Canada and the United States, those with a high interest in agri-tourism perceived Ontario as a place with more to offer in terms of both culture and entertainment as well as nature and outdoor activities. This may partially reflect the fact that those who have participated in such activities were more sophisticated and knowledgeable travellers and more likely to be familiar with Ontario's natural and cultural riches.

Overall Market Potential

Interest in Agri-Tourism:Canada

Interest in Agri-Tourism By Likelihood of Travel Within Canada (Indexed)

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



The Overall Market Potential Index is constructed to identify those segments which are most likely to be responsive to marketing, advertising and promotional initiatives designed to promote agri-tourism. This index indicates that in Canada, Affluent Families represent the prime target market for such initiatives. Other segments with above average interest in agri-tourism include Mainstream Young Families and Affluent Mature and Senior Couples. These segments represent the prime target groups for such promotional activities.

Technical Note

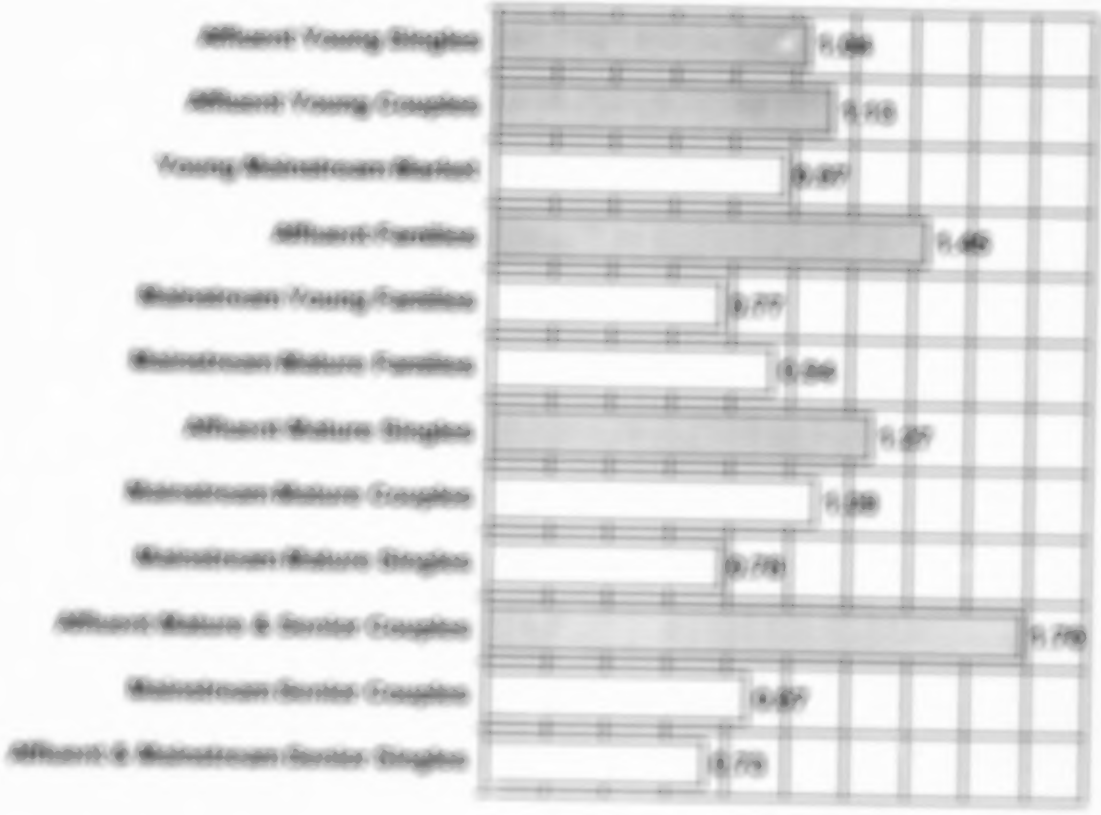
The Overall Market Potential Index is computed by multiplying the percent who visited an interest in agri-tourism destination vacation product and the percent likely to take a trip in the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.

Overall Market Potential

Interest in Agri-Tourism:United States

Interest in Agri-Tourism By Likelihood of Travel To Canada (Indexed)

Percent of Population (18 Plus) Who Either Traveled in Last Two Years or Intends to Travel in Next Two Years



The Overall Visitor Potential index for the United States shows a similar pattern as that observed for Canada. However, in the United States, the Affluent Mature and Senior Couples and Affluent Families are more likely to be responsive to agri-tourism initiatives. Affluent Mature Singles, who often seek out novel vacation experiences, represent a secondary target market for the promotion of agri-tourism in the U.S.

Travel Activities & Motivation Survey

TAMS Technical Appendices

(For Use With the TAMS Reports)

TAMS

March, 2001

Lang

Appendix One

Statistical Precision and Confidence Intervals

Since the Travel Activities & Motivation Survey (TAMS) is based on a random probability sample (rather than a complete census), the statistics reported in this study are estimates. The accuracy of these estimates will vary from analysis to analysis depending on the sample size, the type of measurement reported and measurement variations. The statistical precision associated with any given estimate is reflected by its confidence interval.

A confidence interval is an estimate of the range of values which would be expected by chance alone for a selected probability level. For example, the "95 % confidence interval" is the range of values which would be expected to occur randomly 19 times out of 20 (or 95 % of the time). Thus, if a survey found that 30 % of the individuals in a sample of 500 were interested in a given activity, the 95 % confidence interval for this estimate would be ±3.5 % (or between 33.5 % to 46.5 %). This means that if this survey were conducted 20 times with the same size sample, the estimated level of respondents interested in a given activity would fall between 33.5 % and 46.5 % nineteen times out of 20.

The estimated confidence interval is affected by several factors including the sample size, the type of measure taken (i.e., whether the measurement may assume two values such as "yes" or "no", or many values such as "household income") and the level of variation which exists within the data. As a guideline to interpreting the results of this study, estimates of the 95 % confidence intervals are provided for various sample sizes in the table below:

Number of Cases in Sample

Percent	40000	12000	5000	1000	500	100
50.00%	0.00%	0.00%	0.49%	2.48%	4.96%	24.50%
40.00%	0.00%	0.00%	0.47%	2.38%	4.75%	23.52%
30.00%	0.04%	0.17%	0.41%	2.08%	4.12%	20.35%
20.00%	0.03%	0.13%	0.31%	1.57%	3.14%	15.68%
10.00%	0.02%	0.07%	0.16%	0.88%	1.79%	8.82%
5.00%	0.01%	0.04%	0.09%	0.47%	0.95%	4.66%
2.00%	0.00%	0.02%	0.04%	0.19%	0.38%	1.92%

Appendix Two

Telephone Sample Description: Weighted

Attribute	Level	Total	Canada	U.S.A.
Number of Interviews		46,782	28,397	18,385
Gender	Male	45.0 %	45.1 %	45.0 %
	Female	55.0 %	54.9 %	55.0 %
Age	18 to 25	13.6 %	13.3 %	13.9 %
	26 to 34	20.6 %	20.8 %	20.5 %
	36 to 44	23.3 %	24.1 %	22.8 %
	46 to 54	17.5 %	16.7 %	18.1 %
	56 to 65	11.2 %	11.4 %	11.0 %
	66 Plus	13.7 %	13.7 %	13.7 %
Education Level	High/Trade School	42.5 %	48.6 %	38.6 %
	College or University	49.3 %	46.7 %	51.0 %
	Advanced University Degree	8.1 %	4.7 %	10.4 %
Household Income	Under $20,000	14.8 %	17.8 %	12.8 %
	$20,000 to $40,000	22.9 %	24.6 %	21.8 %
	$40,000 to $60,000	18.9 %	19.0 %	18.9 %
	$60,000 to $80,000	11.8 %	11.7 %	11.8 %
	$80,000 to $100,000	6.4 %	6.3 %	6.4 %
	$100,000 Plus	8.8 %	7.4 %	9.7 %
	Refused/Don't Know	16.5 %	13.2 %	18.6 %

Appendix Two

Mailback Sample Description: Weighted

Attribute	Level	Total	Canada	U.S.A.
Number of Interviews		11,892	5,490	6,402
Gender	Male	43.7 %	44.0 %	43.6 %
	Female	56.3 %	56.0 %	56.4 %
Age	18 to 25	8.3 %	9.7 %	7.1 %
	26 to 34	17.9 %	19.1 %	16.8 %
	36 to 44	24.8 %	25.3 %	24.3 %
	46 to 54	21.7 %	20.0 %	23.1 %
	56 to 65	14.4 %	14.0 %	14.7 %
	66 Plus	13.0 %	11.9 %	14.0 %
Education Level	High/Trade School	31.8 %	38.0 %	26.5 %
	College or University	56.5 %	55.1 %	57.6 %
	Advanced University Degree	11.7 %	6.9 %	15.8 %
Household Income	Under $20,000	8.9 %	10.4 %	7.5 %
	$20,000 to $40,000	21.8 %	23.1 %	20.7 %
	$40,000 to $60,000	22.3 %	22.6 %	22.1 %
	$60,000 to $80,000	15.6 %	15.5 %	15.7 %
	$80,000 to $100,000	8.5 %	8.8 %	8.2 %
	$100,000 Plus	11.6 %	10.8 %	12.3 %
	Refused/Don't Know	11.3 %	8.8 %	13.5 %

Appendix Three

Household Life Cycle Stage

The Household Life Cycle Stage variable has been constructed taking the following variables into consideration: The age of the respondent, the age of all children under 21 living in the household, and the marital status of the respondent. There are eight life cycle stages identified in this variable:

- Young Singles: Not married or living common law; No children (of respondent) under 21 living in the home; Age between 18 and 35
- Young Couples: Married or living common law; No children (of respondent) under 21 living in the home; Age between 18 and 35
- Young Families: At least one child (of respondent) under 13 living in the home; No restrictions for age or marital status
- Mature Families: At least one child (of respondent) under 21 living in the home; No children under 13 living in the home; No restrictions for age or marital status
- Mature Couples: Married or living common law; No children (of respondent) under 21 living in the home; Age between 36 and 65
- Mature Singles: Not married or living common law; No children (of respondent) under 21 living in the home; Age between 36 and 65
- Senior Couples: Married or living common law; No children (of respondent) under 21 living in the home; Age 66 and older
- Senior Singles: Not married or living common law; No children (of respondent) under 21 living in the home; Age 66 and older

Appendix Four:

Lifespan Demographic Segments

- Method Used to Construct Segmentation -

Throughout this report, the TAMS data will be examined using a market segmentation known as the Lifespan Demographic Segments. This scheme identifies various demographic sectors in the market with common vacation patterns and interests.

The Lifespan Demographic Segmentation scheme is an anchored segmentation where the data has been aggregated by life cycle stage, education level and household income. Households may be assigned to any given segment with information about the household life cycle stage, the respondent's education and household income. As such, this scheme is a powerful tool to identify strategic segments.

The Lifespan Demographic Segmentation was developed using the Ontario Tourism Marketing Partnership tracking program, based on 7,241 interviews conducted between July 12, 1999 and April 26, 2000. The segmentation scheme uses information about the types of trips taken by each household, the respondent's tendency to research vacations, and the household's vacation preferences and interests. Thirty-one core segmentor variables were used in this analysis, including: The incidence of 19 types of vacation travel (e.g., family urban explorations, couples retreats, family visits, adventure travel); the extent to which vacations are carefully planned; the amount of information consulted to plan vacations; interest in opportunities to learn while on vacation; interest in novel and exotic destinations; interest in vacations suitable for families; the appeal of vacation packages; the appeal of outdoor vacations; the appeal of cultural exploration; the appeal of pampering and entertainment; the appeal of excitement and nightlife; and the appeal of relaxing in a quiet setting while on vacation.

Appendix Four: Lifespan Segmentation Descriptions

Youth Segments

The three youth segments represent 20.3 % of the total market. Two of these are classified as Affluent Segments because of their household incomes and/or level of education. These households are all under 35, do not have children and are single or married couples.

Affluent Young Singles

- 5.9 % of market; 6.5 % of Canadian market; 5.8 % of U.S. market
- Life Cycle Stages: 100 % young singles; 64.0 % of respondents male
- Average Age: 25.3 years; Age Range: 54.5 % 18 to 25; 45.5 % 26 to 35
- Education: 67.7 % university or college educated; 9.7 % with advanced degrees (e.g., master's)
- Average Household Income: $72,000; Income Categories: 68.7 % $40K to $80K; 31.3 % $80K plus

Affluent Young Couples

- 2.7 % of market; 3.9 % of Canadian market; 2.6 % of U.S. market
- Life Cycle Stages: 100 % young couples; 42.8 % of respondents male
- Average Age: 28.9 years; Age Range: 18.8 % 18 to 25; 81.2 % 26 to 35
- Education: 100 % university or college educated; 17.8 % with advanced degrees (e.g., master's)
- Average Household Income: $74,400; Income Categories: 66.2 % $40K to $80K; 33.8 % $80K plus

Mainstream Youth Market

- 11.8 % of market; 13.2 % of Canadian market; 11.6 % of U.S. market
- Life Cycle Stages: 73 % young singles; 27 % young couples; 56.9 % of respondents male
- Average Age: 25.0 years; Age Range: 57.4 % 18 to 25; 42.6 % 26 to 35
- Education Level: 53 % university or college educated; 4.5 % with advanced degrees (e.g., master's)
- Average Household Income: $24,600; Categories: 93.3 % less than $40K; 6.8 % $40K to $80K

Appendix Four: Lifespan Segmentation Descriptions

Family Segments

The three family segments represent 36.2 % of the total market. One of these is classified as an affluent segment because of its household incomes and/or level of education. All of these households have children under 21 and are primarily married. The Mainstream Young Families have at least one child 12 or younger while the Mainstream Mature Families have children between the ages of 13 and 21 (but no children 12 and under).

Affluent Families

- 6.6 % of market; 5.8 % of Canadian market; 6.7 % of U.S. market
- Life Cycle Stages: 69.9 % young families; 26.4 % mature families; 50 % of respondents male
- Average Age: 41.2 years; Age Range: 23.9 % under 35; 46.8 % 36 to 45; 29.3 % 46 and older
- Education: 100.0 % university or college educated; 29.1 % with advanced degrees (e.g., master's)
- Average Household Income: $107,400; Income Categories: 2.3 % $40K to $80K; 97.7 % $80K plus

Mainstream Young Families

- 23.0 % of market; 20.1 % of Canadian market; 23.4 % of U.S. market
- Life Cycle Stages: 100 % families with children 12 or younger; 42.9 % of respondents male
- Average Age: 35.3 years; Age Range: 52.8 % under 35; 37.1 % 36 to 45; 10.1 % 46 and older
- Education: 50 % university or college educated; 5.5 % with advanced degrees (e.g., master's)
- Average Household Income: $42,800; Income Categories: 49.0 % less than $40K; 51.0 % $40K plus

Mainstream Mature Families

- 6.6 % of market; 8.1 % of Canadian market; 6.4 % of U.S. market
- Life Cycle Stages: 100 % families with children between 13 and 21; 45.1 % of respondents male
- Average Age: 45.3 years; Age Range: 7.8 % under 35; 47.6 % 36 to 45; 44.6 % 46 and older
- Education Level: 47 % university or college educated; 5.5 % with advanced degrees (e.g., master's)
- Average Household Income: $48,200; Income Categories: 37.9 % less than $40K; 62.1 % $40K plus

Appendix Four: Lifespan Segmentation Descriptions

Mature Segments

The three mature segments represent 30.4 % of the total market. One of these is classified as an affluent segment because of its household incomes and/or level of education. These households are all between 36 and 64 and do not have children. (Note: 3.8 % of the mature market has been classified with seniors in the Affluent Mature & Senior Couples).

Affluent Mature Singles

- 5.1 % of market; 2.4 % of Canadian market; 5.4 % of U.S. market
- Life Cycle Stages: 100 % mature singles (36 to 65); 58.1 % of respondents male
- Average Age: 48.5 years; Age Range: 40.2 % 36 to 45; 37.6 % 46 to 55; 22.2 % 56 to 65
- Education: 100 % university or college educated; 26.5 % with advanced degrees (e.g., master's)
- Average Household Income: $71,000; Income Categories: 72.8 % $40K to $80K; 27.2 % $80K plus

Mainstream Mature Couples

- 12.8 % of market; 18.0 % of Canadian market; 12.3 % of U.S. market
- Life Cycle Stages: 100 % mature couples (36 to 65); 52.1 % of respondents male
- Average Age: 52.1 years; Age Range: 23.4 % 36 to 45; 38.4 % 46 to 55; 38.2 % 56 to 65
- Education: 48 % university or college educated; 6.0 % with advanced degrees (e.g., master's)
- Average Household Income: $49,600; Income Categories: 34.1 % less than $40K; 59.8 % $40K plus

Mainstream Mature Singles

- 8.6 % of market; 6.8 % of Canadian market; 8.9 % of U.S. market
- Life Cycle Stages: 73 % mature singles (36 to 65); 58.1 % of respondents male
- Average Age: 50.2 years; Age Range: 35.0 % 36 to 45; 34.0 % 46 to 55; 31.1 % 56 to 65
- Education Level: 42 % university or college educated; 3.9 % with advanced degrees (e.g., master's)
- Average Household Income: $28,800; Income Categories: 84.0 % less than $40K; 16.0 % $40K plus

Appendix Four: Lifespan Segmentation Descriptions

Mature/Senior Segments

The three mature/senior segments represent 16.8 % of the total market. One of these segments is classified as an affluent segment because of its household incomes and/or level of education. The Affluent Mature and Senior Couples are primarily (85 %) from the mature market while the Mainstream Senior Couples and Senior Singles are all over 66 years old.

Affluent Mature and Senior Couples

- 4.5 % of market; 3.5 % of Canadian market; 4.7 % of U.S. market
- Life Cycle Stages: 85 % mature couples (35 to 65); 15 % senior couples (66 plus); 54.6 % male
- Average Age: 54.5 years; Age Range: 21.0 % 36 to 45; 37.3 % 46 to 55; 41.7 % 56 plus
- Education: 100 % university or college educated; 30.8 % with advanced degrees (e.g., master's)
- Average Household Income: $108,600; Income Categories: 100 % $80K plus

Mainstream Senior Couples

- 5.0 % of market; 6.5 % of Canadian market; 4.8 % of U.S. market
- Life Cycle Stages: 100 % senior couples (66 plus); 56.1 % of respondents male
- Average Age: 72.7 years; Age Range: 100 % 66 plus
- Education: 42.4 % university or college educated; 5.8 % with advanced degrees (e.g., master's)
- Average Household Income:$37,900; Income Categories: 57.4 % Less than $40K; 42.6 % $40K plus

(Affluent and Mainstream) Senior Singles

- 7.3 % of market; 5.1 % of Canadian market; 7.5 % of U.S. market
- Life Cycle Stages: 100 % senior singles; 35.6 % of respondents male
- Average Age: 74.9 years ; Age Range: 100 % 66 plus
- Education Level: 43 % university or college educated; 8.0 % with advanced degrees (e.g., master's)
- Average Household Income:$28,600; Income Categories: 78.7 % Less than $40K; 21.3 % $40K plus

Appendix Three

Factor Analysis of Vacation Experiences Sought During Past Two Years

The vacation experiences sought in the last two years were submitted to a factor analysis to identify underlying vacation experiences sought in pleasure travel. Factor analysis is a statistical technique which identifies and uses the association between individual responses to generate more general (or abstract) measures of the vacation experiences sought.The factors may be used to generate factor scores which reflect the general vacation experiences sought. This analysis identified the following five vacation experience factors:

Exploration: To visit historical sites and important places in history; To see natural wonders and important natural sites; To experience different cultures and ways of life; To experience unspoiled nature

Personal Indulgence: To visit a popular, trendy place; To visit casinos and gamble; To experience "the good life" - fine cuisine, being pampered; To experience city life (e.g., nightlife, shopping, museums)

Romance & Relaxation: To rest, relax and recuperate; For intimacy and romance; To spend quality time with the family away from home

Sports, Hobbies & Learning: To participate in a hobby or sport (e.g., golf, fishing, photography); To participate in a hands-on learning experience (e.g., archaeological digs, cooking courses)

Socializing: To visit friends or relatives who live in another city or country; To spend time with a group of good friends; To be someplace that feels familiar and safe

Appendix Four

Factor Analysis of Outdoor Activities While Travelling

The outdoor vacation activities sought in the last two years were submitted to a factor analysis to identify general outdoor activities sought in travel. Factor analysis is a statistical technique which uses the association between individual responses to construct more general (or abstract) categories of outdoor activities sought by individuals while travelling. The factors may be used to generate factor scores which measure the degree to which these general categories of outdoor activities have been pursued by various types of travellers. This analysis identified the following 17 types of outdoor activities:

Competitive Sports: Playing basketball; Baseball; Football; Volleyball; Bowling; Soccer; Chess or backgammon; Tennis
Nature Sports: Whitewater rafting; Kayaking & canoeing; Hiking or backpacking; Horseback riding
Water Sports: Sailing,; Windsurfing; Scuba diving
Extreme Sports: Hang-gliding; Hot-air ballooning; Parachuting; Bungee jumping
Golfing: Golfing at a resort; Taking a golf package tour; Playing occasional golf game
Biking: Recreational biking; Mountain biking; Biking on overnight tour trip
Motorcycling: Motorcycling on overnight touring trip; Motorcycling - Day excursion
Fishing: Salt water fishing; Fresh water fishing; Motorboating
Hunting: Hunting big game; Hunting small game
Fitness: Jogging outdoors; Working out in fitness centre
Skiing & Snowboarding: Cross-country skiing (day activity; overnight tour group); Downhill skiing; Snowboarding
Snowmobiling: Snowmobiling as an overnight tour trip; Snowmobiling on organized trails
Skating & Hockey: Ice skating; Playing ice hockey; In line/Roller skating
Rock & Ice Climbing: Rock climbing; Ice climbing; Heli-skiing
Swimming & Sunbathing: Sunbathing or sitting on a beach; Swimming in oceans; Swimming in lakes
Natural Sightseeing: Wildflower & flora viewing; Birdwatching; Going on picnics in park settings
Natural Phenomena: Seeing the northern lights or other Arctic experiences; Whale watching

Appendix Five

Factor Analysis of Cultural & Entertainment Activities Participated In

The cultural and entertainment vacation activities sought in the last two years was submitted to a factor analysis to identify general categories of cultural and entertainment activities sought during travel. Factor analysis is a statistical technique which uses the association between individual items to construct more general (or abstract) categories of cultural and entertainment activities that tend to be sought by individuals while traveling. The factors may be used to generate factor scores which measure the degree to which these general categories of cultural and entertainment activities have been pursued by various segments of the travel market. This analysis identified the following 10 activity types:

Shopping & Dining: **Shopping or browsing**: Clothing, shoes, jewelry; Bookstores and music stores; Local arts and crafts; Gourmet food; **Restaurant dining**: Regional or local cooking; Acclaimed restaurants

Museums, Art Galleries & Historical Sites: General history/heritage museums, Historical sites (e.g., Statue of Liberty, Pearl Harbor), Science & technology museums, Historical replica/re-enactments, Art galleries

High Arts: Opera, Classical concerts, Ballet or other dance performances, Live theater

Theme Parks: Movie theme parks (MGM studios), Science & technology theme parks (Epcot), Amusement parks (Disneyland)

Professional Sports: Baseball, Football, Basketball, Ice hockey, Professional golf

Zoos, Aquariums, Planetariums: Zoos, Aquariums, Children's museums, Planetariums

Agricultural & Local Fairs: Farmers' fair or market, Local festivals or fairs, Pick your own farms or participating in harvesting, Shop or browse for antiques

Concerts, Carnivals or Festivals: Music festivals, Carnivals such as Mardi Gras, Jazz concerts, Rock & roll concerts, Musical attractions like Rock 'n Roll Museum

Aboriginal Cultural Experiences: Aboriginal cultural experiences in remote settings, Powwows or other aboriginal celebrations, Aboriginal attractions such as the Indian Museum

Gardening & Natural Wonders: Botanical gardens, Garden attractions such as Cypress Gardens or Tivoli Park, Natural wonders such as Niagara Falls or the Grand Canyon

Cultural Festivals: Literary festivals or events, Theater festivals, International film festivals

National/International Sporting Events: National/International sporting events, Professional figure skating

Gambling & Racing: Horse racing, Casinos, Auto racing

Rodeo & Amateur Tournaments: Western theme events such as rodeos, Amateur sports/arts/hobby tournaments

French Canadian Cultural Experiences: French Canadian cultural experiences

Appendix Six

Factor Analysis of Accommodation-Related Activities Participated In

The types of accommodation-related activities participated in during the last two years were submitted to a factor analysis to identify general activity-related accommodation types. Factor analysis is a statistical technique which uses the association between individual items to construct more general (or abstract) categories of activity-related accommodations. The factors may be used to generate factor scores which measure the degree to which general types of activity-related accommodations have been stayed in by each segment of the travel market. This analysis identified the following seven types of activity-related accommodations:

- Camping: Camping outside of public camp grounds, Camping in public camp grounds, Camping in wilderness settings
- Cooking & Wine Tasting Schools: Staying at cooking school, Staying at wine tasting schools
- Lakeside or Wilderness Lodges (Vehicle Accessible): Vehicle accessible wilderness lodge, Lakeside resort in summer, Lakeside resort in winter
- Remote Fly-in Lodges or Outposts: Staying at remote fly-in outpost, Staying at remote fly-in lodge
- Ski Resorts: Staying at ski resort in summer, Staying at ski resort in winter
- Seaside Resorts: Staying at seaside resort in winter, Staying at seaside resort a summer
- Bed & Breakfast, Health Spas & Gourmet Restaurants With Accommodations: Staying at bed & breakfast, Staying at health spa, Staying at gourmet restaurants

Appendix Seven

Factor Analysis of Tours & Cruises Taken During Last Two Years

The types of tours and cruises taken during the last two years were submitted to a factor analysis to identify general tour/cruise types. Factor analysis is a statistical technique which uses the association between responses to individual tours to construct more general (or abstract) categories of touring activities. The factors may be used to generate factor scores, which measure the degree to which each category of tours has been taken by various types of travellers. The analysis identified seven types of tours and cruises:

Tours By Personal Vehicle: Coastal or shoreline scenic drives by day, Wandering around small villages & towns - overnight

Guided Bus Tours: Scenic day tours in countryside by bus, Guided bus day tours in cities, Guided scenic tours of countryside involving an overnight stay

Wine Tours: Going to wineries for day visits, Touring a region's wineries involving an overnight stay

Specialty Cruises: Great Lakes cruises by boat involving an overnight stay, Submarine cruises involving an overnight stay

Scenic Tours By Boat or Train: Scenic day or evening tour by boat, Scenic day tours by train

Scenic Day Tour By Air: Scenic day tour by air

Ocean Cruises: Ocean cruises

Appendix Eight

Factor Analysis of Canada's Image Attributes

The image ratings of Canada and Ontario were factor analyzed to identify the primary image dimensions upon which Canada and Ontario were assessed. Factor analysis is a statistical technique which uses the association between each individual image attribute to construct more general image attributes. The more general image dimensions identified through this process are considered to reflect the underlying (or true) impressions of Canada and Ontario that have been the basis of the individual's response to each attribute. The factors may be used to generate factor scores which measure the degree to which each *general* impression of Canada or Ontario is held by the respondent. The 23 image factors were grouped into two broader image dimensions as follows:

Culture & Entertainment

A destination that is *perceived* to offer opportunities to experience culture and entertainment is seen to be a popular, trendy place, with many cultural attractions and events, a great place to see historical sites and important places in history, and a great place to experience different cultures and ways of life. Such a place is also considered to be a great place to experience city life, with many interesting shops and lots to see and do. A cultural and entertainment destination tends to be better known for its urban (cultural and entertainment) centres than its natural richness and opportunities for outdoor vacation activities. The specific image attributes that tend to be associated with this factor include: *A popular, trendy place; A place with many cultural attractions and events; A great place to experience city life (e.g., nightlife, shopping); A place with interesting shops; A place you go for romance; A great place to see historical sites and important places in history; A place with lots of things for young adults to see and do; A place with lots for families to see and do; A great place to experience different cultures and ways of life; A place with lots of things for mature adults to see and do.*

Nature & Outdoor Activities

A destination that is *perceived* to offer opportunities to experience nature and participate in outdoor activities tends to be perceived as a great place for fishing, hunting and outdoor activities in general. Such a destination is considered likely to have beautiful scenery, to be very clean and well cared for, and to be a place that respects the natural environment. Destinations that offer opportunities to experience nature and participate in outdoor activities are also perceived to be very safe for tourists, great places to relax and get away from it all, and great places for adventure and excitement. Such destinations are generally better known for their natural richness than their urban and cultural richness. The specific image attributes that tend to be associated with this factor include: *A great place for hunting; A place that respects the natural environment; One of the best destinations for outdoor activities; A place with beautiful scenery; A place that is very clean and well cared for; A place that is safe for tourists; A great place for adventure and excitement; A great place to relax and get away from it all.*

Culture & Entertainment

A destination that is perceived to offer opportunities to experience culture and entertainment is seen to be a popular, trendy place, with many cultural attractions and events, a great place to see historical sites and important places in history, and a great place to experience different cultures and ways of life. Such a place is also considered to be a great place to experience city life, with many interesting shops and lots to see and do. A cultural and entertainment destination tends to be better known for its urban (cultural and entertainment) centres than its natural richness and opportunities for outdoor vacation activities.

- A popular, trendy place
- A place with many cultural attractions and events
- A great place to experience city life (e.g., nightlife, shopping)
- A place with interesting shops
- A place you go for romance
- A great place to see historical sites and important places in history
- A place with lots of things for young adults to see and do
- A place with lots for families to see and do
- A great place to experience different cultures and ways of life
- A place with lots of things for mature adults to see and do

Nature & Outdoor Activities

A destination that is perceived to offer opportunities to experience nature and participate in outdoor activities tends to be perceived as a great place for fishing, hunting and outdoor activities in general. Such a destination is considered likely to have beautiful scenery, to be very clean and well cared for, and to be a place that respects the natural environment. Destinations that offer opportunities to experience nature and participate in outdoor activities are also perceived to be very safe for tourists, great places to relax and get away from it all, and great places for adventure and excitement. Such destinations are generally better known for their natural richness than their urban and cultural richness.

- A great place for fishing
- A great place for hunting
- A place that respects the natural environment
- One of the best destinations for outdoor activities
- A place with beautiful scenery
- A place that is very clean and well cared for
- A place that is safe for tourists
- A great place for adventure and excitement
- A great place to relax and get away from it all